

REQUEST FOR RECORDS RETENTION SCHEDULE

To be Submitted to the Records Management Division
Hall of Records CommissionSCHEDULE-
NO.

370

PAGE
NO.

1. ✓

1. Requesting Agency

CONTROLLER OF THE TREASURY

2. Division or Bureau of Requesting Agency

INCOME TAX DIVISION

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.1. APPLICATION FOR EMPLOYER'S IDENTIFICATION NUMBER

Form: MF 1
Size: 8 1/2" x 11"
Dates: 1955 - -
Quantity: 1 1/2 drawers (26 cubic feet)
File Arrangement: Alphabetical by name of company
Annual Accumulation: 2 cubic feet (est.)

Employers are required to apply for an identification number which is used in processing and filing various records associated with the withholding procedure. Information on the application forms is utilized when checking on ownership of previous businesses or on account numbers which may have been previously established for individuals listed on the form. Specific information shown on the form includes the identification number assigned, the business name, address, names and addresses of proprietors, partners or officers of the corporation; legal form of business (individual, partnership, or corporation); location of all places of business; date on which business started; whether the business is new or old; name, address, and trade name of former owner; date of the application; and signature of individual making the application.

RECOMMENDATION: RETAIN FOR FIVE YEARS AND THEN DESTROY.

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7. Agency, Division or Bureau Representative

Signature

Chief - Income Tax Division

Title

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.7/7/1960
Date

Archivist

OCT 5 1960
Date

Secretary

REQUEST FOR RECORDS RETENTION SCHEDULE
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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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2. EMPLOYERS' WITHHOLDING TAX FILE

Form No.: MW 506 and MW508
 Size: 8½" x 3½"
 Dates: 1955 - -
 Quantity: office, 132 filing trays (66 cubic feet)
 storage, 40 cubic feet
 (Total, 106 cubic feet)
 File Arrangement: By quarter and numerical by batch and identification number
 Annual Accumulation: 40 filing trays (20 cubic feet)
 Audit: State and Internal
 Index: Index File (Item 4)

Employers file the Employers' Quarterly Returns of Income Tax Withheld (Form MW 506) together with a remittance covering the total amount of tax withheld for all employees on the payroll. The forms are pre-printed to show the employer's name and address and identification number. The employer completes the form to show the total tax withheld for the quarter, adjustments in amount of tax for prior quarter, and the total amount of adjusted remittance. The form is signed and dated by the employer or his representative. The forms are posted to the Ledger Cards (Item 8) and are filed in batches.

At the end of each year, the final quarterly report is accompanied by an MW 508, Employers' Year End Reconciliation of Quarterly Withholding Statements (Forms MW 506) with Income Tax Withholding Statements (Forms MW 509), and the MW 509's (Withholding Tax Statements). This reconciliation balances the total wages withheld as shown by copies of employees' statements (509's) against the total tax withheld during the four quarters of the tax year as shown by the 506's. The recommendation below applies to both the MW 506's and the MW 508's.

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

3. EMPLOYERS' WITHHOLDING TAX FILE - FINAL FILINGS AND RE-ASSIGNED ACCOUNTS

Form No.: MW 506
 Size: 8½" x 3½"
 Dates: 1959 - -
 Quantity: Final filings: 4 filing trays
 Reassigned accounts, 16 filing trays
 (Total, 10 cubic feet)
 File Arrangement: Numerical by identification number
 Annual Accumulation: 14 filing trays (7 cubic feet)
 Audit: State and Internal

Employers going out of business file with the Division a final

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Handwritten signature

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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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Quarterly Return of Income Tax Withheld (MW 506). These final returns are held in a suspense file for eighteen months. The Ledger Cards for the closed accounts are then cleared and the identification numbers are assigned to new employers who are applying for a number. After the identification numbers have been reassigned, the returns are filed in a re-assigned file with a notation of the name of the employer to whom the number has been reassigned and the effective date.

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

4. INDEX TO EMPLOYERS' WITHHOLDING TAX FILE (INDEX FILE)

Size: 8½" x 3½"
 Dates: 1955 - -
 Quantity: 66 filing trays (33 cubic feet)
 File Arrangement: See below
 Annual Accumulation: 2 cubic feet (est.)

This Index is utilized as an aid in employer identification and as a control over the filing by employers of MW 506's. The Index is maintained in three separate series - open, closed, and cross-reference." The "Open" file is arranged alphabetically by company name; the "cross-reference" by name of individual owner; and the "closed" by name of company which has gone out of business or changed its name or address. Each index card gives the company or owner's name, address, and identification number.

RECOMMENDATION: RETAIN PERMANENTLY.

5. DELINQUENT WITHHOLDING TAX REPORTS

Size: 8½" x 11"
 Dates: 1955 - -
 Quantity: 4 drawers (7 cubic feet)
 File Arrangement: Alphabetical by name of company
 Annual Accumulation: 2 cubic feet (est.)

When an employer fails to file the required Quarterly Returns of Income Tax Withheld (Item 2), a Delinquent Withholding Tax Report is prepared and forwarded to the Investigation Section for further action. After an investigation is completed and corrective action taken, the Reports are returned to the Accounting Section for filing. If the investigation establishes the fact that the business has closed, the Delinquent Report becomes the basis for closing out the files maintained for that particular business. The Report gives the name and address of the business, its identification number, the quarters during which the business was delinquent, the total amount due, action taken by Accounting Section, a summary of the results of contacts by field representatives, and the final action. The recommendation below applies only to employer accounts

that have been closed (continued on next page)

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(Continuation Sheet)

Hall of Records
Commission

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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and balanced out.

RECOMMENDATION: RETAIN FOR THREE YEARS AFTER DATE OF CLOSURE AND THEN DESTROY.

6. INDEX TO MW 506 MAILINGS

Size: IBM card size
 Dates: 1955 - -
 Quantity: 72 filing trays (36 cubic feet)
 File Arrangement: Numerical by identification number

This file contains an IBM card or cards for each employer to whom MW 506's are to be mailed. The cards are utilized as an addressing media--i.e. pre-printing the employer's name, address, and identification number on the form which is to be mailed (MW 506). The cards are non-record within the meaning of the statute governing non-record material (Article 41, Section 179) Annotated Code of Maryland, 1957 Edition, and may be destroyed when they are no longer needed.

7. WITHHOLDING TAX STATEMENTS

Form No.: MW 509 (Copy A)
 Size: 8" x 3 1/2"
 Dates: 1955 - -
 Quantity: 1,550 filing trays (775 cubic feet - est.)
 File Arrangement: 1955-56, 1958 - - Alphabetical by name of employee
 1957, Numerical by withholding identification number and alphabetical by name of employee

Index: Index to Employers' Withholding Tax File (Item 4)
 Audit: Internal
 Annual Accumulation: 320 filing trays (160 cubic feet)

Withholding Tax Statements are prepared by employers for each employee from whom income tax was withheld during the year or whose wages for purposes of withholding exceeded the amount of one withholding exemption for any payroll period. "Copy A" is forwarded to the Income Tax Division. Copies B and C are retained by the employee and Copy D is retained by the employer preparing the statement. The Income Tax Division utilizes Copy A to verify that a taxpayer has filed a return and properly reported his earnings. Each 509 (Withholding Tax Statement) gives the employer's name, address, and withholding identification number, the employee's name, address, and social security number, the total wages paid, the amount of excludable sick pay, and the amount of Maryland income tax withheld, if any. The recommendation below applies only to Copy A.

RECOMMENDATION: RETAIN UNTIL VERIFIED WITH ALPHABETICAL INDEX (SCHEDULE 6, ITEM 1), OR FOR FIVE YEARS, WHETHER VERIFIED OR NOT, AND THEN DESTROY.

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OCT 5 1960	<i>[Signature]</i>
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8. LEDGER CARDS

Form No.: Diebold Tradex form 49413
 Size: 5" x 8"
 Dates: 1955 - -
 Quantity: 36 document drawers and 13 filing cabinets
 (66,000 accounts) - Total, 20 cubic feet
 File Arrangement: Numerical by employer identification number
 Annual Accumulation: 1 cubic foot (est.)
 Index: Index to Employers' Withholding Tax File (Item 4)
 Audit: State and Internal

A Ledger Card is maintained for each employer who withholds income taxes from wages subject to withholding. The cards are posted quarterly from the MW 506's (Quarterly Returns of Income Tax Withheld) to show all withholding payments by the employer. The Ledger Card for each employer shows his name and address, identification number, the date of the quarterly payment, the batch number under which the MW 509's (Income Tax Withholding Statements) are filed, the amount of the payment, and the accumulated payments for the year. Each card provides space for a four-year period. At the end of each year the accumulated payments are verified against the amount shown on the MW 508 (Employer's Year End Reconciliation). If the amounts are the same, a red figure is recorded in the "Current Payments" column. Cards for the period 1955-57 are held in a separate file in three series: Closed-cards that have been balanced out; Open--includes accounts owing payments; Void and transfers--includes accounts which are being carried under other numbers, and employers who are no longer withholding and whose identification numbers have been reassigned.

RECOMMENDATION: RETAIN PERMANENTLY.

9. DECLARATION OF ESTIMATED MARYLAND INCOME TAX (ORIGINAL DECLARATIONS OF ESTIMATED TAX)

Form No.: Form 502-D
 Size: 8 1/2" x 3 3/4"
 Dates: 1955 - -
 Quantity: 5 1/4 cubic feet (estimated)
 Annual Accumulation: 18 filing trays (9 cubic feet)
 File Arrangement: Numerical by account number
 Disposable Amount: 30 filing trays (15 cubic feet)
 Index: Index to Declarations of Estimated Tax (Item-10)
 Audit: State

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Certain taxpayers who have income not subject to withholding are required to file a Declaration of Estimated Maryland Income Tax (Form 502-D). When the form is filed, a taxpayer includes a remittance covering not less than one-fourth of the estimated tax to be paid by declaration. Thereafter, the taxpayer remits the balance of

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REQUEST FOR RECORDS RETENTION SCHEDULE (Continuation Sheet)

RRM 1A 1-56 of Records Commission

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.

the tax in quarterly installments. To facilitate the processing of the quarterly payments, Declaration Payment Cards (Item 11) are prepared and filed by the Division, the Original Account Card being based on the Declaration form. The portion of the Declaration form received by the Income Tax Division gives the taxpayer's name and address, the total estimated income tax for the year, the amount of the tax to be withheld by employers, the amount of tax to be paid by declaration, the amount submitted with the declaration, the date, and taxpayer's signature. Declarations may be amended at any time by the taxpayer. In any case the taxpayer's income tax return (Schedule 7, Item 1) constitutes the final record of taxes paid both by declaration and withholding.

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

10. INDEX TO DECLARATIONS OF ESTIMATED TAX (DECLARATIONS OF ESTIMATED TAX)

Size: IBM card size
Dates: 1955 - -
Quantity: 300 filing trays or 150 cubic feet (est.)
File Arrangement: Alphabetical by name of individual
Annual Accumulation: 55 filing trays
Disposable Amount: 50 cubic feet (est.)

This Index is prepared annually from the Declarations (Item 9) and includes IBM cards for each individual who has filed a Declaration of Estimated Maryland Income Tax (Form 502 D). Each Index card gives the individual's name, address, a code symbol indicating that a declaration has been filed, the year in which the declaration was filed, the individual's account number, and the estimated tax.

RECOMMENDATION: RETAIN UNTIL DECLARATION PAYMENT IS VERIFIED AGAINST INDIVIDUAL'S INCOME TAX RETURN AND THEN DESTROY, PROVIDED THAT AUDIT REQUIREMENTS HAVE BEEN MET AND THE RECORDS ARE AT LEAST THREE YEARS OLD.

11. DECLARATION PAYMENT CARDS (DECLARATION OF ESTIMATED TAX - ORIGINAL ACCOUNT CARDS AND ADDITIONAL PAYMENT CARDS)

Size: IBM card size
Dates: 1955 - -
Quantity: 780 filing trays or 390 cubic feet (est.)
File Arrangement: Numerical by account number
Annual Accumulation: 190 filing trays (80 cubic feet, est.)
Disposable Amount: 315 filing trays (157 cubic feet)
Index: Index to Declarations of Estimated Tax (Item 10)
Audit: State and Internal

This card file facilitates processing of the Notices of Payment Due (Item 13). The Original Account Cards (Payment Cards) in the file

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are based upon the Declaration of Estimated Maryland Income Tax (form 502 D) filed by each taxpayer who has income not subject to withholding. For each subsequent quarterly payment an "Additional Payment" card is punched and filed so that at the end of the year four cards are in the file for each taxpayer filing a declaration. Each Original card shows the taxpayer's name and address, the amount of declared tax, the amount paid, a numerical code indicating the type of payment, a letter code indicating that the payment is by declaration, the tax year, and the taxpayer's account number. Summary Payment Cards (Item 12) are printed at the end of each year to consolidate each taxpayer's payments.

RECOMMENDATION: RETAIN UNTIL DECLARATION PAYMENT IS VERIFIED AGAINST INDIVIDUAL'S INCOME TAX RETURN AND THEN DESTROY, PROVIDED THAT AUDIT REQUIREMENTS HAVE BEEN MET AND THE RECORDS ARE AT LEAST THREE YEARS OLD.

12. SUMMARY PAYMENT CARDS (WHITE CARDS)

Size: 7" x 3 1/4"
 Dates: 1955 - -
 Quantity: 150 filing trays (est.)
 File Arrangement: Alphabetical by surname of taxpayer
 Annual Accumulation: 30 filing trays
 Audit: State and Internal

Summary Payment Cards are printed at the end of each tax year to consolidate each taxpayer's quarterly declaration payments as shown on the Declaration Payment Cards (Item 11). These cards are retained in an alphabetical file and are utilized for checking against the Index to Declarations of Estimated Tax (Item 10) to verify filing and payment of the declared amount. Each "white card" gives the file number of the payment cards, the taxpayer's name and address, the code numbers of payment notices, the date and amount remitted with each notice, the total tax paid, the tax year, and the file number of the taxpayer's income tax return (entered by hand).

RECOMMENDATION: RETAIN UNTIL DECLARATION PAYMENT IS VERIFIED AGAINST INDIVIDUAL'S INCOME TAX RETURN AND THEN DESTROY, PROVIDED THAT AUDIT REQUIREMENTS HAVE BEEN MET AND THE RECORDS ARE AT LEAST THREE YEARS OLD.

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13. INSTALLMENT NOTICES (NOTICES OF PAYMENT DUE ON DECLARATION OF ESTIMATED MARYLAND INCOME TAX)

Form No.: 502 D-1
 Dates: 1955 - -
 Size: 8½" x 3½" and 4¼" x 3½"
 Quantity: 400 filing trays or 200 cubic feet (est.)
 File Arrangement: By year, by installment, and by batch
 Annual Accumulation: 40 cubic feet (est.)
 Disposable Amount: 120 cubic feet
 Audit: State

Taxpayers who have taxable income which is not subject to withholding are required to file Declarations of Estimated Maryland Income Tax (form 502-D). The estimated tax is payable quarterly and the Notices of Payment Due (form 502 D-1) serve as a billing for the quarterly installment. The forms are pre-printed to show the taxpayer's name, address, and account number, the estimated tax, the amount previously paid, and the balance due. A new version of the form, adopted in 1960, provides the taxpayer with a stub, the other portion (State's copy) being forwarded to the Income Tax Division with the quarterly remittance. Since these forms carry only the amount of estimated tax, and the amount paid through Declaration is recorded on the individual taxpayer's income tax return, the Notices of Payment Due have no value beyond the minimum statutory retention period.

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

14. ACCOUNTING RECORDS

Size: 8½" x 11"
 Dates: 1957 - -
 Quantity: 90 cubic feet (est.)
 File Arrangement: By type of record and chronological therein
 Annual Accumulation: 30 cubic feet (est.)
 Audit: State

This item includes all standard accounting forms used by State agencies as supporting data to the final book of entry. [The final books of entry, the Ledgers and Journals, are to be retained permanently.] Specifically these supporting records are:

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REQUEST FOR RECORDS RETENTION SCHEDULE
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Comptroller of the Treasury

Form No.

- E-1-S Memorandum of Adjustment
- E-1 and E-1/2 Distribution of Charges
- DD-1 Transmittal
- R-2 (formerly MR-2) Certificate of Deposit and Bank Deposit Slip
- 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 Invoice
- 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
- BB-40 Request for Position Action

Others

- Adding and posting machine tape - created when listing deposits and withholding accounts
- Cash Receipts - carbon copies of receipts issued to taxpayers
- Deposit Slips (Forms 1 and 2) - Income Tax

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REQUEST FOR RECORDS RETENTION SCHEDULE
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Division copy

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

15. 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. G02, Item 1-b, approved by the Board of Public Works, January 11, 1954).

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-1/2 (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).

16. 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.

17. LEAVE RECORDS

This file includes:

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(Continuation Sheet)

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.

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

The recommendation below applies to all records listed above with the exception of the last leave record card of an employee who is separated from State service. Merit System Rule 42 (June 1, 1960) requires that the last leave card be retained by the agency for not less than four calendar years from separation date.

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

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Andrew H. Hulch
SECRETARY