

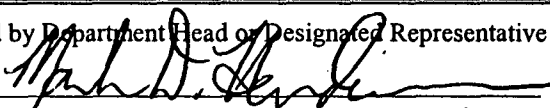
**UNIVERSITY OF MARYLAND
COLLEGE PARK**

DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION	Schedule No.: 2126
RECORDS RETENTION AND DISPOSAL SCHEDULE	Page 1 of 5

Agency: University of Maryland College Park	Division/Unit: Office of Information Technology
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Item No.	Description	Retention
1	<p>The Department of Communication and Business Services, Administrative Computer Center, Academic Information Technology Services, and the Computer Science Center have combined to create the Office of Information Technology. The following schedule supersedes schedules 1986, 1538, 1878, and 1752.</p> <p><u>General Files</u> Alpha, subject, administrative, and chronological correspondence (paper and electronic) containing original incoming and copies of outgoing correspondence, departmental policies and procedures, training and development manuals, brochures and other departmental publications, service forms, statistical data, outreach files, monthly computer utilization reports, job submittal log, service assistance files, user ID forms, production move files, reports, departmental employee listing, call costing reports, and project material.</p>	<p>Screen annually and destroy that material for which no further reference is required. Retain material with continuing administrative or legal value in paper for 25 years, then destroy. Material with historical value to be sent to University Archives at the University of Maryland for permanent retention. Forward a copy of departmental publications to the University Archives for permanent retention.</p>
2	<p><u>Human Resource Records</u></p> <p>A. Timekeeping Records - individual sheets approved by the supervisor that show hours worked and leave taken for student, contingent, non-exempt, and exempt employees.</p> <p>B. Employee Leave Balances - leave balances for contingent, non-exempt, and exempt employees.</p>	<p>Retain for 3 years and until audit requirements are met, then destroy. Prior to July 29, 2001, Office of Record is the Office of Information Technology. Effective July 29, 2001, Office of Record is Payroll Services / Personnel Services.</p> <p>Retain leave balances for 3 years, then destroy. Retain final leave balance for 3 years after termination of employment, then destroy. Office of Record is Payroll Services / Personnel Services.</p>

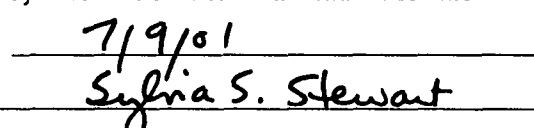
Authorized by Department Head or Designated Representative

Signature: 

Title: Deputy CIO & COO Date: 6-25-01

Authorized by Vice President of Administrative Affairs

Date: 7/9/01

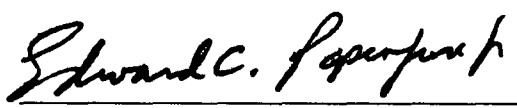
Signature: 

Type Name: Dr. Sylvia S. Stewart

Title: Associate Vice President

Schedule Authorized by State Archivist

Date: AUG 22 2001

Signature: 

**UNIVERSITY OF MARYLAND
COLLEGE PARK**

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION**

Schedule No.: 2126

Page 2 of 5

**RECORDS RETENTION AND DISPOSAL SCHEDULE
(CONTINUATION SHEET)**

Item No.	Description	Retention
3	<p><u>Data Processing</u> Software documentation for operating systems used in data information management. These files include: machine specifications, operating instructions, production reports, flow charts, narratives, distribution lists, descriptions, training materials, reference materials, contracts, and supporting correspondence.</p>	Retain for period of time for which subject equipment is in use, then destroy.
4	<p><u>Employee Applications</u> Applications for student, contingent, non-exempt, and exempt positions; lists of eligibles for non-exempt positions.</p>	Screen annually and destroy applications of rejected applicants. Retain applications of hired employees for 3 years after termination of employment, then destroy. Retain lists of eligibles for three years after date of hire for the position, then destroy. Office of Record is the Office of Information Technology.
5	<p><u>Performance Review and Development Files</u> Evaluations of exempt and non-exempt staff members, which indicate employee performance factors, performance ratings given by the employee's supervisor, and employee development plans.</p>	Retain for 3 years after termination of employment, then destroy. Office of Record is the Office of Information Technology.
6	<p><u>Search Committee Files</u> Search committee materials for administrators and exempt staff. Consists of advertisements, final recommendation of the committee, meeting minutes containing final recommendation data, voting results, finalist resumes, and all information on appointed candidate.</p>	Office of Information Technology to retain listed material for 5 years, then destroy. Destroy other search committee material after 1 year.
7	<p><u>Position Files</u> Requests for position classification action, study numbers, and position descriptions.</p>	Retain for 3 years after position is abolished, then destroy.

**UNIVERSITY OF MARYLAND
COLLEGE PARK**

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION**

Schedule No.: 2126

Page 3 of 5

**RECORDS RETENTION AND DISPOSAL SCHEDULE
(CONTINUATION SHEET)**

Item No.	Description	Retention
8	<u>Payroll Records for State and Self-Support Accounts</u> Journals, one-pay certification cards, W2 forms, journal vouchers, and other internal adjustment forms.	Retain for 3 years and until audit requirements are met, then destroy. Office of Record is Payroll Services.
9	<u>Purchasing Records for State and Self-Support Accounts</u> Internal account records, including copies of requisitions, purchase orders, invoices, packing slips, purchasing card transaction logs, and University of Maryland purchasing cardholder agreements.	Retain UM purchasing cardholder agreements until employee returns card and all outstanding changes have been resolved, then destroy. Retain other listed records for 3 years and until audit requirements are met, then destroy. Office of Record for purchasing card transactions logs and small procurement orders is the Office of Information Technology. Office of Record for purchase orders is Procurement and Supply.
10	<u>Accounting Records for State and Self-Support Accounts</u> Account ledgers, journal voucher batch sheets, batch control sheets, reconciliations, honoraria payments, revolving fund, special payments, periodic financial statements, budget items, travel expense receipts, travel card logs, and other accounting material.	Retain for 3 years and until audit requirements are met, then destroy. Office of Record for travel expense statements in paper form is Corporate Services, Department of Business Services.
11	<u>Telecommunications System Accounting Records</u> Computer tape of AT&T network bill, telephone system chargeback summary, end-of-month telephone bill summary, centrex equipment report, telephone bill adjustments, vendor phone bills, telecommunications pricing sheets billed to departments, contract items, and telecommunications service and equipment bills.	Retain for 6 years, 3 months and until audit requirements are met, then destroy. Destroy paper records for end-of-month telephone bill summary after microfiche or digital records are verified. Office of Record for telephone system billing material is the Office of Information Technology.
12	<u>Student tape of telephone bills and student account adjustments</u>	Retain for 3 years and until audit requirements are met, then destroy. Office of Record is the Office of Information Technology.

**UNIVERSITY OF MARYLAND
COLLEGE PARK**

DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION		Schedule No.: 2126 Page 4 of 5
RECORDS RETENTION AND DISPOSAL SCHEDULE (CONTINUATION SHEET)		
Item No.	Description	Retention
13	<u>Third Party Telecommunications Billing Magnetic Tapes</u>	Destroy after bill has been run.
14	<u>Telecommunications Trouble Tickets</u> Requests for telecommunications repair service.	Retain for 2 years in paper form, then retain in microfiche or digital form for an additional 4 years and 3 months, then destroy. Destroy paper records after microfiche or digital records are received. Office of Record is Networking and Telecommunications Services, Office of Information Technology.
15	<u>Ethernet Orders</u> Requests for Ethernet installations, moves, or deletions.	Retain for 2 years in paper form, then retain in microfiche or digital form for an additional 4 years and 3 months, then destroy. Destroy paper records after microfiche or digital records are received. Office of Record is Networking and Telecommunications Services, Office of Information Technology.
16	<u>Calling Card Orders</u> Requests for calling cards.	Retain in paper or digital form for 3 years after card becomes inactive, then destroy. Office of Record is Networking and Telecommunications Services, Office of Information Technology.
17	<u>Telecommunications Work Orders</u> Requests to add, move, install, or disconnect telecommunications equipment.	Retain for 2 years in paper form, then retain in microfiche or digital form for an additional 4 years and 3 months, then destroy. Destroy paper records after microfiche or digital records are received. Office of Record is Networking and Telecommunications Services, Office of Information Technology.

**UNIVERSITY OF MARYLAND
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DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION		Schedule No.: 2126
RECORDS RETENTION AND DISPOSAL SCHEDULE (CONTINUATION SHEET)		Page 5 of 5
Item No.	Description	Retention
18	<u>Inventory Material</u> Records identifying non-capital and capital equipment and related material including: manual sheets, inventory adjustment forms, replacement of inventory tag forms, equipment loan forms, and disposal of surplus property forms.	Retain for 3 years and until audit requirements are met, then destroy. Office of Record is Inventory Control, Office of the Comptroller.
19	<u>Contracts and Grants</u> Records that document contracts and grants received by the Office of Information Technology from any source, including applications, proposals, agreements, research reports, publicity notices, acknowledgments and transfer of funds records, controlling rules and regulations, copies of periodic reports, correspondence, and memoranda.	Retain state contract and grant files for 3 years after the close of the contract, then destroy. For federal contract and grant files, adhere to the retention standards established in OMB Circular No. A-110, Subpart C (attached).
If University Archives at the University of Maryland are not available, material having permanent retention will be transferred to the Maryland State Archives in Annapolis. If departmental archives are not available at the University of Maryland, material having limited retention (i.e., 25 years) will be transferred to the State Records Center in Jessup.		Until audit requirements are met means 3 years for state-related documents, 3 years for non-monetary federal-related documents, 3 years for monetary federal-related documents under \$25,000, and 6 years, 3 months for monetary federal-related documents over \$25,000.