

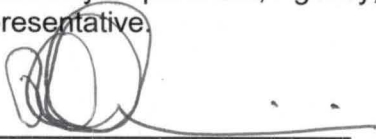
**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
RECORDS RETENTION AND DISPOSAL SCHEDULE**

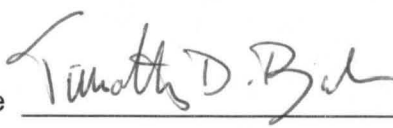
Schedule No. 2664

Page 1 of 2

Agency Maryland Energy Administration	Division/Unit
---	----------------------

Item No.	Description	Retention
1.	<u>ACCOUNTING RECORDS</u> A. Accounts Payable Invoices	Retain for (3) years or until all audit requirements have been fulfilled, whichever comes later, then destroy.
2.	<u>GRANTS & REBATES</u> A. Clean Energy Grants B. Energy Efficiency & Conservation Block Grants C. Home Performance Rebates D. Low to Moderate Income Empower Grants	Retain for (3) years or until all audit requirements have been fulfilled, whichever comes later, then destroy.
3.	<u>CONTRACTS & MOUs</u> A. State and private sector agreements to implement projects/programs which are assigned to the MEA to manage.	Retain for (3) years or until all audit requirements have been fulfilled, whichever comes later, then destroy.

Schedule Approved by Department, Agency, or Division Representative
 Date _____
 Signature 
 Typed Name **Ralph Scherini**
 Title **Director Finance, Budget & Administration**

Schedule Authorized by State Archivist
 Date 10-3-13
 Signature 

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
RECORDS RETENTION AND DISPOSAL SCHEDULE
(Continuation Sheet)**

Schedule No. 2664

Page 2 of 2

Agency

Maryland Energy Administration

Division/Unit

Item No.

Description

Retention

4.

LOANS

- A. Jane E. Lawton Conservation Loan Program (JELLP), previously known as Community Energy Loan Program (CELP)
- B. State Agency Loan Program (SALP)

Retain for (3) years or until all audit requirements have been fulfilled, whichever comes later, then destroy.

5.

PROCUREMENT

- A. Awards made by MEA, including the supporting documents associated with the procurement.

Retain for (3) years or until all audit requirements have been fulfilled, whichever comes later, then destroy.

INSTRUCTIONS –TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD P.O. BOX 275 – JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY Page 1 Of 1
1. DEPARTMENT/AGENCY MEA – D13	2. DIVISION	3. UNIT
DEFINITION – Records series – A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. RECORDS SERIES TITLE Accounting Records	5. EARLIEST YEAR / LATEST YEAR FY 06 TO FY 13	
6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series. Include the purpose or function of the Series). Accounts Payable Invoices, Paid contract, rebate and grant invoices, invoices for office supplies and services (e.g. telephone, postage, etc.), membership invoices, association dues, sponsorships, agency transfers, corporate credit card reconciliations, expense reports and supporting documentation.		
7. RECORD SERIES FORMAT(S) <input checked="" type="checkbox"/> Letter Size Microfilm Legal Size Computer Tape Bound Book Floppy Disk Audio Tape Video Tape Other (Specify)	8. RECORD SERIES SEQUENCE <input checked="" type="checkbox"/> Alphabetical Numerical Chronological Geographical Other (Specify)	9. VOLUME File Drawer(s) Microfilm Reel(s) Computer Tape(s) Other (Specify) _____ Number 10. ANNUAL ACCUMULATION File Drawer(s) Microfilm Reel(s) Computer Tape(s) Other (Specify) _____ Number
11. FILE IS USED <input checked="" type="checkbox"/> Daily Weekly Monthly Annually	12. FILE BECOMES INACTIVE AFTER 3 fiscal _____ _____ Number Month(s) <input checked="" type="checkbox"/> Year(s)	
13. CURRENT LOCATION(S) (Bldg., Floor, Room) File room	14. IS RECORD SERIES DUPLICATED ELSEWHERE? (If yes, specify agency or office) Yes <input checked="" type="checkbox"/> No	
15. ACCESS RESTRICTIONS If yes, cite law(s) & regs Yes <input checked="" type="checkbox"/> No	16. AUDIT REQUIREMENTS None <input checked="" type="checkbox"/> State <input checked="" type="checkbox"/> Federal Independent	
17. IS AN INDEX SYSTEM USED? (If yes, explain briefly and describe any software/hardware) Yes <input checked="" type="checkbox"/> No	18. RECOMMENDED RETENTION 3 years or until all audit requirements have been fulfilled, then destroy.	
19. NAME AND TITLE OF PREPARER Denise McCoskery Administrative Specialist	20. TELEPHONE NUMBER 410 260 7655 x7740	21. DATE July 1, 2013

INSTRUCTIONS –TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD P.O. BOX 275 – JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY Page 1 Of 1
1. DEPARTMENT/AGENCY MEA – D13	2. DIVISION	3. UNIT
DEFINITION – Records series – A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. RECORDS SERIES TITLE Grants & Rebates	5. EARLIEST YEAR / LATEST YEAR FY 05 TO FY 13	
6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series. Include the purpose or function of the Series). ENERGY EFFICIENCY CONSERVATION BLOCK GRANT: Grant agreement, energy audit, approval documents, federal compliance documentation, historical review forms, invoices, general correspondence and grant reporting documents. EMPOWER CLEAN ENERGY GRANTS: Grant agreement, historical preservation review, invoices, grant reporting and general correspondence. RENEWABLE CLEAN ENERGY GRANTS: MEA application, copies of permits and inspections, terms and conditions, confirmation of nationally tested components, invoices, photos of installed systems, historic review forms, SDAT printouts and maps, general correspondence. HOME PERFORMANCE REBATES: Signed reservation form, energy audit report, terms and conditions, contract for improvements, completion certificate, sales invoice, test-out form, monthly progress reports, Buy American certificates, Davis Bacon review form, site visit/desk audit checklist, general correspondence.		
7. RECORD SERIES FORMAT(S) <input checked="" type="checkbox"/> Letter Size Microfilm Legal Size Computer Tape Bound Book Floppy Disk Audio Tape Video Tape Other (Specify)	8. RECORD SERIES SEQUENCE <input checked="" type="checkbox"/> Alphabetical Numerical Chronological Geographical Other (Specify)	9. VOLUME File Drawer(s) Microfilm Reel(s) Computer Tape(s) Other (Specify) _____ Number 10. ANNUAL ACCUMULATION File Drawer(s) Microfilm Reel(s) Computer Tape(s) Other (Specify) _____ Number
11. FILE IS USED <input checked="" type="checkbox"/> Daily Weekly Monthly Annually	12. FILE BECOMES INACTIVE AFTER 3 fiscal _____ _____ Month(s) <input type="checkbox"/> Year(s) Number	
13. CURRENT LOCATION(S) (Bldg., Floor, Room) 60 West Street, Suite 300 Annapolis MD 21401	14. IS RECORD SERIES DUPLICATED ELSEWHERE? (If yes, specify agency or office) Yes <input checked="" type="checkbox"/> No	
15. ACCESS RESTRICTIONS If yes, cite law(s) & regs Yes <input checked="" type="checkbox"/> No	16. AUDIT REQUIREMENTS None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent	
17. IS AN INDEX SYSTEM USED? (If yes, explain briefly and describe any software/hardware) Geothermal Grants FY09 & FY10 are indexed. All other records are alphabetical within each FY. <input checked="" type="checkbox"/> Yes No	18. RECOMMENDED RETENTION 3 years or until all audit requirements have been fulfilled, then destroy.	
19. NAME AND TITLE OF PREPARER Denise McCoskery Office Manager	20. TELEPHONE NUMBER 410 260 7655 x7740	21. DATE July 1, 2013

INSTRUCTIONS –TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD P.O. BOX 275 – JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY Page 1 Of 1
1. DEPARTMENT/AGENCY MEA – D13	2. DIVISION	3. UNIT
DEFINITION – Records series – A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. RECORDS SERIES TITLE Contracts & MOUs	5. EARLIEST YEAR / LATEST YEAR FY 00 – FY 13	
6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series. Include the purpose or function of the Series). State and private sector agreements to implement projects/programs which are assigned to the MEA to manage. Contract, task orders, routing form, correspondence, purchase order, progress reports, invoices.		
7. RECORD SERIES FORMAT(S) <input checked="" type="checkbox"/> Letter Size Microfilm <input type="checkbox"/> Legal Size Computer Tape <input type="checkbox"/> Bound Book Floppy Disk <input type="checkbox"/> Audio Tape Video Tape <input type="checkbox"/> Other (Specify)	8. RECORD SERIES SEQUENCE <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (Specify)	9. VOLUME <input type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (Specify) _____ Number 10. ANNUAL ACCUMULATION <input type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (Specify) _____ Number
11. FILE IS USED <input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Annually	12. FILE BECOMES INACTIVE AFTER 3 fiscal _____ _____ Number Month(s) <input type="checkbox"/> Year(s)	
13. CURRENT LOCATION(S) (Bldg., Floor, Room) File room	14. IS RECORD SERIES DUPLICATED ELSEWHERE? (If yes, specify agency or office) Yes <input checked="" type="checkbox"/> No	
15. ACCESS RESTRICTIONS If yes, cite law(s) & regs Yes <input checked="" type="checkbox"/> No	16. AUDIT REQUIREMENTS None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent	
17. IS AN INDEX SYSTEM USED? (If yes, explain briefly and describe any software/hardware) Yes <input checked="" type="checkbox"/> No	18. RECOMMENDED RETENTION 3 years or until all audit requirements have been fulfilled, then destroy.	
19. NAME AND TITLE OF PREPARER Denise McCoskery Office Manager	20. TELEPHONE NUMBER 410 260 7655 x7740	21. DATE July 1, 2013

INSTRUCTIONS –TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD P.O. BOX 275 – JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY Page 1 Of 1
1. DEPARTMENT/AGENCY MEA – D13	2. DIVISION	3. UNIT
DEFINITION – Records series – A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. RECORDS SERIES TITLE Loans	5. EARLIEST YEAR / LATEST YEAR FY 90 – FY 13	
6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series. Include the purpose or function of the Series). State Agency Loan Program (SALP), Jane E. Lawton Conservation Loan Program (JELLP), previously known as Community Energy Loan Program (CELP) Application, repayment schedule, technical assistance report, certificate of good standing, financial statements, notice of default, feasibility study, audit report, & closing.		
7. RECORD SERIES FORMAT(S) <input checked="" type="checkbox"/> Letter Size Microfilm <input type="checkbox"/> Legal Size Computer Tape <input type="checkbox"/> Bound Book Floppy Disk <input type="checkbox"/> Audio Tape Video Tape <input type="checkbox"/> Other (Specify)	8. RECORD SERIES SEQUENCE <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (Specify)	9. VOLUME <input type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (Specify) _____ Number 10. ANNUAL ACCUMULATION <input type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (Specify) _____ Number
11. FILE IS USED <input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Annually	12. FILE BECOMES INACTIVE AFTER 3 fiscal _____ _____ Number Month(s) <input type="checkbox"/> Year(s)	
13. CURRENT LOCATION(S) (Bldg., Floor, Room) 60 West Street, Suite 300, Annapolis, MD 21401	14. IS RECORD SERIES DUPLICATED ELSEWHERE? (If yes, specify agency or office) Yes <input checked="" type="checkbox"/> No	
15. ACCESS RESTRICTIONS If yes, cite law(s) & regs Yes <input checked="" type="checkbox"/> No	16. AUDIT REQUIREMENTS None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent	
17. IS AN INDEX SYSTEM USED? (If yes, explain briefly and describe any software/hardware) CELP/Lawton Loans are all indexed. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	18. RECOMMENDED RETENTION 3 years or until all audit requirements have been fulfilled, then destroy.	
19. NAME AND TITLE OF PREPARER Denise McCoskery Office Manager	20. TELEPHONE NUMBER 410 260 7655 x7740	21. DATE July 1, 2013

INSTRUCTIONS –TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD P.O. BOX 275 – JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY Page 1 Of 1
1. DEPARTMENT/AGENCY MEA – D13	2. DIVISION	3. UNIT
DEFINITION – Records series – A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. RECORDS SERIES TITLE Procurement	5. EARLIEST YEAR / LATEST YEAR FY 09 – FY13	
6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series. Include the purpose or function of the Series). Awards made by MEA, including the supporting documents associated with the procurement. Supporting documentation up to the award and afterwards, including RFP, pre-proposal conference, proposals from bidders, procurement team review, debriefing documents, MBE documents, correspondence, copies of executed contracts, and other related contract material.		
7. RECORD SERIES FORMAT(S) <input type="checkbox"/> Letter Size Microfilm <input type="checkbox"/> Legal Size Computer Tape <input type="checkbox"/> Bound Book Floppy Disk <input type="checkbox"/> Audio Tape Video Tape <input type="checkbox"/> Other (Specify)	8. RECORD SERIES SEQUENCE <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (Specify)	9. VOLUME <input type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (Specify) _____ Number 10. ANNUAL ACCUMULATION <input type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (Specify) _____ Number
11. FILE IS USED <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Annually	12. FILE BECOMES INACTIVE AFTER 3 fiscal _____ _____ Month(s) <input type="checkbox"/> Year(s) Number	
13. CURRENT LOCATION(S) (Bldg., Floor, Room) File room	14. IS RECORD SERIES DUPLICATED ELSEWHERE? (If yes, specify agency or office) Yes <input type="checkbox"/> No	
15. ACCESS RESTRICTIONS If yes, cite law(s) & regs Yes <input type="checkbox"/> No	16. AUDIT REQUIREMENTS None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent	
17. IS AN INDEX SYSTEM USED? (If yes, explain briefly and describe any software/hardware) Yes <input type="checkbox"/> No	18. RECOMMENDED RETENTION 3 years or until all audit requirements have been fulfilled, then destroy.	
19. NAME AND TITLE OF PREPARER Denise McCoskery Office Manager	20. TELEPHONE NUMBER 410 260 7655 x7740	21. DATE July 1, 2013