

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

Schedule No. 2807

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Agency  
REGISTERS OF WILLS AND ORPHANS' COURTS

Division/Unit

Item No.	Description	Retention
	<p>MARYLAND COURT SYSTEM</p> <p>Probate Records</p> <p>REGISTERS OF WILLS AND ORPHANS' COURTS</p> <p>GENERAL RETENTION AND DISPOSAL SCHEDULE</p> <p>No. <u>2807</u></p> <p>General Schedule No. <u>2807</u> governs the retention and disposal or records created by or deposited in the Offices of the Registers of Wills and the Orphans' Courts.</p> <p>Records from this series that are maintained permanently will be transferred to the Maryland State Archives.</p> <p>This Schedule supersedes Schedule 2687.</p>	

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Item No.	Description	Retention
	Section I  <u>ADMINISTRATIVE OFFICE RECORDS</u>	
1.	<p><u>GENERAL ADMINISTRATIVE CORRESPONDENCE</u></p> <p>General correspondence, reports and miscellaneous papers relating to the operation and organization of the office of the Register of Wills, including formal and informal opinions and correspondence with the Office of the Attorney General.</p>	<p>Retain permanently opinions and correspondence with the Office of the Attorney General, office organization papers, reports, and material having continuing legal and/or administrative value to the operation of the office.</p> <p>Retain all other material for three (3) years, then destroy.</p>
2.	<p><u>PERSONNEL FILES</u></p> <p>Papers, correspondence and forms related to employment in the office of the Register of Wills, including application forms, change in status information, tax reporting forms, complaints and other miscellaneous records, and forms and correspondence pertaining to the individual employee.</p>	<p>Retain for twelve (12) years after termination of service, then destroy.</p>

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Item No.	Description	Retention
	Section II <u>FISCAL RECORDS</u>	
1.	<u>AUDIT RECORDS</u>  Audit reports, discussion notes, and correspondence with the Office of Legislative Audits.	Retain permanently; transfer periodically to the Maryland State Archives.
2.	<u>BUDGET AND FISCAL PLANNING RECORDS</u>  Materials and supplies physical inventory Report of fixed assets Report of materials and supplies	Retain for three (3) years and until all audit requirements have been fulfilled, then destroy.
3.	<u>GENERAL ACCOUNTING RECORDS</u>  Bank deposit slips Bank statements Credit transmittals	Retain for three (3) years and until all audit requirements have been fulfilled, then destroy.
4.	<u>MISCELLANEOUS ACCOUNTING RECORDS</u>  Bank books, statements and deposit receipts Cash receipts and disbursements Delivery orders and receipts DGS disposal forms and contracts Employee reimbursements Expense Sheets Paid bills and invoices Periodic financial reports to local and State agencies Receipt copies Reconciliation balance sheets Returned check or check copy	Retain for three (3) years and until all audit requirements have been fulfilled, then destroy.

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Item No.	Description	Retention
5.	<u>PURCHASING RECORDS</u>  Contracts awarded Monthly credit card reports Monthly credit card statements Purchase orders Requisition of supplies Stores requisition	Retain for three (3) years and until all audit requirements have been fulfilled, then destroy.
6.	<u>PAYROLL RECORDS</u>  Central Payroll Bureau pay reports Central Payroll Bureau payroll and check registers Employee weekly and annual time sheets	Retain for three (3) years and until all audit requirements have been fulfilled, then destroy.

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Item No.	Description	Retention
	Section III <u>PROBATE RECORDS</u>	
1.	<p><u>ADMINISTRATION/ESTATE DOCKETS FOR ESTATES OPENED THROUGH SEPTEMBER 30, 2014.</u></p> <p>Paper record of administration of estates listing all papers issued or received with dates of filing, estate numbers, and names of estates.</p>	Retain permanently; transfer periodically to the Maryland State Archives.
2.	<p><u>ADMINISTRATION/ESTATE DOCKETS FOR ESTATES OPENED COMMENCING OCTOBER 1, 2014.</u></p> <p>Digital record of administration of estates listing all papers issued or received with dates of filing, estate numbers, and names of estates.</p>	Retain permanently; transfer annually to the Maryland State Archives.
3.	<p><u>CLAIMS AGAINST DECEDENTS WITH NO ESTATE OF RECORD FILED THROUGH MAY 18, 1989.</u></p> <p>Record of claims against decedents.</p>	Retain permanently; transfer periodically to the Maryland State Archives.
4.	<p><u>CLAIMS AGAINST DECEDENTS WITH NO ESTATE OF RECORD FILED ON OR AFTER MAY 19, 1989.</u></p> <p>Record of claims against decedents.</p>	Scan original paper record to Maryland State Archives standards then destroy. Retain images permanently, and transfer annually to the Maryland State Archives.



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Item No.	Description	Retention
5.	<p><u>ESTATE FILES FOR ESTATES OPENED THROUGH SEPTEMBER 30, 2014.</u></p> <p>All papers docketed in an estate are scanned to State Archives standards and the original papers filed in the estate case file under estate number.</p>	<p>Retain digital images and original paper files permanently; transfer digital images annually and original paper files periodically to the Maryland State Archives.</p>
6.	<p><u>ESTATE FILES FOR ESTATES OPENED COMMENCING OCTOBER 1, 2014.</u></p> <p>All papers docketed in an estate are scanned to State Archives standards and the original papers filed in the estate case file under estate number.</p>	<p>Retain digital images permanently; transfer annually to the Maryland State Archives.</p> <p>Retain the original paper file for six (6) months after the closing of the estate, then destroy original paper file except for any wills or codicils. Refer to Item No. 10 for retention of wills and codicils filed in estates.</p>
7.	<p><u>GUARDIAN ACCOUNTS, BONDS, DOCKETS AND INDEXES</u></p> <p>Record of accounting by guardians for receipts and disbursements to and for wards giving names, account numbers, itemized expenditures and receipts with dates of filing and approval by the Orphans' Court and record of the bonding of guardians with names of the bonders and bondees, the amounts, conditions and obligations of the bonds, names of the wards and certifications by the Registers of Wills.</p>	<p>Retain permanently; transfer periodically to the Maryland State Archives.</p>

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Item No.	Description	Retention
8.	<p><u>MINUTES AND PROCEEDINGS OF THE ORPHANS' COURT AND INDEXES</u></p> <p>Summary of proceedings of the Orphans' Court.</p>	<p>Retain digital images and bound books permanently; transfer digital images and bound books periodically to the Maryland State Archives.</p>
9.	<p><u>VERBATIM PROCEEDINGS OF THE ORPHANS' COURT</u></p> <p>Records of courtroom proceedings before an Orphans' Court, which reflect accurately the spoken word and nonverbal communication and action, and any accompanying notes, "recording logs," etc., recorded by an audiographer, reporter, videographer, courtroom clerk or other individual, through use of an electronic device, digital device, magnetic audio or video tape, steno mask equipment, stenotype machine, written symbols or other medium.</p>	<p>Retain verbatim proceedings for twelve (12) years, then destroy.</p>
10.	<p><u>WILLS AND CODICILS AND INDEXES</u></p> <p>Original wills and codicils, probated and unprobated, and probated copies of wills and codicils which are filed with the Estate Case Files and indexed.</p>	<p>Retain permanently; transfer periodically to the Maryland State Archives.</p>
11.	<p><u>WILLS AND CODICILS OF LIVING PERSONS AND INDEXES</u></p> <p>Wills deposited by testators or agents for safekeeping with the Registers of Wills. Indexed by names of the testators. The wills are restricted pursuant to Estates and Trusts Article, §4-201(d). Wills are stored until claimed by testator or agent or, after death, upon petition to open an estate or transfer will to appropriate venue for probate.</p>	<p>Retain unclaimed wills for eighty (80) years after deposit, then transfer permanently to the Maryland State Archives.</p> <p>Retain index permanently; transfer periodically to the Maryland State Archives.</p>

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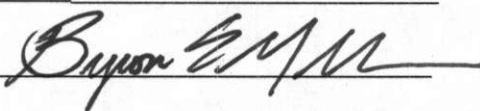
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	<p align="center">MARYLAND COURT SYSTEM</p> <p align="center">Probate Records</p> <p align="center">REGISTERS OF WILLS AND ORPHANS' COURTS</p> <p align="center">GENERAL RETENTION AND DISPOSAL SCHEDULE</p> <p align="center">No. ____</p> <p>General Schedule No. ____ governs the retention and disposal or records created by or deposited in the Offices of the Registers of Wills and the Orphans' Courts.</p> <p>Records from this series that are maintained permanently will be transferred to the Maryland State Archives.</p> <p align="center">This Schedule supersedes Schedule 2687.</p>	

**Schedule Approved by Department, Agency, or Division Representative**

Date: 9-19-2016

Signature: 

Typed Name: Byron E. Macfarlane

Title: Register of Wills for Howard County

**Schedule Approved by State Archivist**

Date: \_\_\_\_\_

9.30.16

Signature: 