

ANNE ARUNDEL COUNTY SANITARY COMMISSION

Assessments Division

XX

1 PROJECT FILES

Quantity: 19 file drawers, 70 bundles

Size: Letter size

Dates: 1937...

File Arrangement: Chronologically by job or project number -
(year, month, job numbered as received)

Index: Job Status Record (Item 2)

Project Files are maintained separately in the Assessments Division, the Engineering Division, and the Finance and Accounting Division. The papers filed in each of the three divisions vary according to the requirements of the office in which the file is created. The project file described herein is the first of the three files. It is initiated upon receipt of the original petition, after which Commission personnel assigned to property transfers and title searches in the office of the Clerk of the Circuit Court forward to the Assessments Division copies of the abstracts of deeds verifying title to property subject to the proposed project. A copy of the original petition, together with duplicate deed abstracts is forwarded to Engineering, at which time the Engineering Project File (Schedule C- , Item) is set up and the project number assigned. A memorandum is then prepared in Assessments, requesting Engineering to prepare plans and cost estimates for the project. Engineering prepares and forwards five sets of plans and estimates to Assessments which are distributed as follows:-

- Administration (1 set)
- Purchasing Division (1 set)
- Finance & Accounting Div. (1 set)
- Assessments Division (2 sets)

Next, a computation of surpluses or deficits is prepared in

(continued)

Approved R.P.W., 6-6-65

(cont.) Assessments. These figures are double-checked by the Supervisor of Assessments, after which the project is presented at the next scheduled departmental meeting for recommendations. After the accepted recommendations are incorporated, the project is then presented to the next Commission meeting for approval or rejection. At this time, the Commission grants authority for a public hearing, if necessary. Upon approval of the project, the Assessment Division project papers are placed in the active file until notification of completion of the project, at which time Notices of Assessment are mailed and the Assessment Cards are typed, giving charges and ownership. These cards are filed in Finance and Accounting until retired (Schedule C- , Item).

After the Notices of Assessment have been mailed, the Project File is retired to the inactive file and retained in Assessments.

The file folder in Assessments contains all or some of the following papers:-

- | | |
|---|--------------------------|
| Petitions & Summary Sheets | Advertising for Bids |
| Notices of Hearings | Work Sheets |
| Letters of Approval & Disapproval | Inter-Office Memoranda |
| Plans & Estimates | Hearings & Exhibits |
| Review Sheets for Computation of | Assessment Notice Copies |
| Deficits or Surpluses (self-supporting or non-self-supporting projects) | |

The outside of the folder carries a notation of the dates of submission to the various divisions for approval, including date of approval by the Commission, Administration, Engineering, Legal, Finance & Accounting, and the Comptroller, with dates of hearings, if any, and the date of completion of the project.

RECOMMENDATION: RETAIN IN ACTIVE FILE UNTIL COMPLETION OF PROJECT, THEN COMBINE WITH PROJECT FILES FROM THE ENGINEERING AND FINANCE & ACCOUNTING DIVISIONS, ELIMINATING DUPLICATION OF PAPERS; MICROFILM AND DESTROY ORIGINAL PAPERS; RETAIN MICROFILM PERMANENTLY.

2 **JOB STATUS RECORD**

- Quantity: 1 post binder
- Size: 11" x 14" x 2"
- Dates: 1959...
- File Arr.: Chronological, by project number
- Index: 4" x 6" card index:- 1 card tray current, 1 non-current

In addition to the Project Files (Item 1), a current resume of the status of projects is maintained in a post binder, by dates on which petitions were recorded, giving the name of the petitioner, location of property and assigned project number, dates on which papers were sent to Engineering and returned to Assessments, date of departmental meeting on the project, action taken, and the date papers were sent to the Commission, date of Commission action, date of public hearings, if any, and date of completion of the project. The Job Status Record includes a card file for ready reference,

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(cont.) divided into "Current" and "Non-Current" projects, also arranged by project number.

The recommendation applies to both (A) the Job Status Record and (B) the card files:-

RECOMMENDATION: (A) RETAIN JOB STATUS RECORD WHILE CURRENT AND FOR THREE YEARS THEREAFTER, THEN DESTROY.

(B) RETAIN CARD INDEX PERMANENTLY.

3 QUADRANGLE MAPS

Quantity: 1 hanging map file
 Size: 24" x 24"
 Dates: 1922... (est.)
 File Arr.: By district

These copies of quadrangle maps (scale: 200" to 1") show each Water District administered by the Commission in quadrangles giving lot and block numbers, streets and highways, in blocks of four, lettered A, B, C, D, and further broken down within each quadrangle, numbered 1, 2, 3, 4. These maps are prepared in the Engineering Division and are used to assign project numbers. The maps are replaced annually.

The replaced copy is considered nonrecord within the meaning of the statute governing nonrecord material (Annotated Code of Maryland, 1957 edition as amended, Art. 41, Sec. 179), and may be destroyed as soon as no longer needed by the office.

4 DEED ABSTRACTS

Quantity: 5 legal file cabinets
 Size: Letter-size
 Dates: 1922...
 File Arr.: By quadrangle

The Commission employs personnel assigned to the Courthouse in Annapolis for the purpose of preparing daily abstracts of deeds in transfers of property and searching titles for Commission projects. The Abstracts (mimeographed forms) are forwarded to Assessments, then to the Engineering Division for addition of the quadrangle designation (by which they are filed), the lot and block numbers and the street names, with a notation of service to be rendered. The forms are then forwarded to the Assessment Division for correction of the Assessment Cards (Item 5) and preparation of new cards in cases of new property or transfers of property. The forms are then filed in the Assessments Division.

RECOMMENDATION: RETAIN PERMANENTLY.

5 ASSESSMENT CARDS

Quantity: 408 visible card trays (active; 40 card drawers (inactive)
 Dates: 1922...
 Size: 6" x 6"
 File Arr.: By block and lot number

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Annual water and sewerage assessments are assigned in the Assessments Division and recorded on a visible type card. The cards are forwarded to the billing section of the Finance & Accounting Division for the purpose of preparing the annual assessment bills, and they are then returned to Assessments. When cards are retired, they are placed in an inactive file. Each card has space for assessments covering a period of ten years, giving block and lot numbers for each property, address and name of tenant, the frontage, class and rate, the sewerage and water permit numbers and dates of issue, name and address of the owner if not the same as tenant, district, assessment or account number, mortgage holder (if any), and name of person to be billed, the assessment year, showing in columnar form the water and sewerage charges and dates paid, sewer service charges, if any, with a space for remarks.

RECOMMENDATION: RETAIN WHILE ACTIVE, AFTER WHICH RETIRE TO INACTIVE STATUS FOR THIRTY YEARS, THEN DESTROY.