

**REQUEST FOR RECORDS RETENTION SCHEDULE**  
To be Submitted to the Records Management Division  
Hall of Records Commission

SCHEDULE NO. **C-58**  
PAGE NO. **1**

1. Requesting Agency <b>ANNE ARUNDEL COUNTY</b>	2. Division or Bureau of Requesting Agency <b>TABULATING DEPARTMENT</b>
--	--

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. TABULATING CARDS - MASTER FILE**

Form No.: **Restington-Rand P-21387**  
 Size: **3 1/2" x 7 3/8"**  
 Dates: **1955 - -**  
 Quantity: **50 cubic feet**  
 File Arrangement: **By District and alphabetical therein**  
 Annual Accumulation: **2 cubic feet**  
 Disposable Amount: **None**

The Master File is the first of three series of tabulating cards. The cards in this series are salmon colored, and there is a set of cards for each piece of real property appearing in the Field Book of Assessments. Each set is composed of at least three cards, one showing the amount of assessment, one the location of the property, and one the name and address of the owner. All information on any card appears both in prose and punch-hole form. All information in the file is based on the Field Book of Assessments, and any changes made in the Field Book of Assessments are at once entered in the Master File.

The feature which distinguishes the Master File from the other two series of Tabulating Cards is its arrangement. Unlike the other two series the Master File is arranged in the same manner - alphabetical within districts - as the tax account numbers are arranged, and therefore only the Master File is or can be used to keep track of Account Numbers and assign new ones. The Master File is also used to find all property in any district owned by a single person. Except in

7. Agency, Division or Bureau Representative

Signature _____	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.
Date _____	Archivist _____	Date _____ Secretary _____

REQUEST FOR RECORDS RETENTION SCHEDULE  
(Continuation Sheet)

SCHEDULE  
NO. C-58

PAGE  
NO. 2

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.

arrangement, the Master File is an exact duplicate of the Assessor's File, and serves as a security copy thereof.

When any change occurs in assessment, property lines, or owner the appropriate cards are removed and replaced with new ones containing the changes. The old cards are then filed alphabetically by district in a Dead File, which accumulates at the rate of two cubic feet per year. Cards in the Dead File have no value other than to serve as checks against errors in transcription.

RECOMMENDATION: RETAIN WHILE CURRENT FOR THREE YEARS AFTER TRANSFER TO DEAD FILE AND THEN DESTROY.

2. TABULATING CARDS - ASSESSOR'S FILE

Form No.: Herington-Rand P-24307

Size: 3 1/2" x 7 3/8"

Dates: 1955 - -

Quantity: 50 cubic feet

File Arrangement: District, sub-district, and alphabetical therein

Annual Accumulation: 2 cubic feet

The Assessor's File is the second of three series of tabulating cards. The cards in this series are yellow, and are exact duplicates of the cards in the Master File series.

The Assessor's File is exactly reproduced each October 1st to make the Tax File, and this is its only purpose.

Changes are made in the Assessor's File in the same manner and at the same time as they are made in the Master File. A Dead File is thus created which is an exact duplicate of the Master File Dead File. The Assessor's Dead File is considered non-record within the meaning of the statute governing non-record material. (Article 41, Section 155, Annotated Code of Maryland, 1951 Edition).

RECOMMENDATION: RETAIN WHILE CURRENT AND THEN DESTROY.

3. TABULATING CARDS - TAX FILE

Form No.: Herington-Rand P-24307

Size: 3 1/2" x 7 3/8"

Dates: 1955 - -

Quantity: 50 cubic feet

File Arrangement: Annual, then by district, sub-district, and alphabetical

Annual Accumulation: 50 cubic feet

Audit: Annual outside audit and State audit

The Tax File is the third of three series of tabulating cards. The

REQUEST FOR RECORDS RETENTION SCHEDULE  
(Continuation Sheet)

SCHEDULE NO. C-58

PAGE NO. 3

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.

cards in this series are manila. They are first made by duplicating the Assessor's File on October 1st, and are then sent to a contractor to be run through an electric computer. The computer finds each tax amount (by multiplying assessment figures by the tax rates) and records the amounts on the cards as coded punch holes. The Tax File cards are then returned to the Tabulating Department. At this stage, they contain all information on the Assessor's File and Master File as of October 1st, and in addition contain the computed tax figures.

Two records of the Treasurer are prepared by tabulating the Tax File - the Tax Roll and the Tax Bills. The Tax File is also used to balance daily receipts against the Treasurer's Cash Register Tapes, to provide a breakdown of special tax funds each month for the Finance Department, and to tabulate the balance of unpaid accounts whenever required.

The annual Tax File eventually breaks down into three subsidiary annual series -

1. **Paid File:** As tax payments are made, the cards are pulled, punched paid, and filed in an annual Paid File.
2. **Unpaid File:** The cards representing unpaid accounts at the end of a year constitute the Unpaid File. When late payments are made on these accounts the cards are transferred to the Paid File. At the end of two years the Unpaid File is tabulated as a list of tax sale property. The Unpaid File is eventually reduced to nothing by redemptions, tax sale purchases or reversion of the property to the County.
3. **Dead File:** When a partial payment is made to an account, the corresponding cards are removed to the Dead File and replaced by two new sets of cards, one showing the payment made and the other giving the unpaid balance.

All payments to accounts are also recorded in the Treasurer's Tax Roll books.

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

REAL PROPERTY TAX FILE

Form No.: McBe Keyser D95200X

Size: 8 1/2" x 11"

Dates: 1951-1955

Quantity: 70 cubic feet

File Arrangement: Districts, sub-districts, and alphabetical therein

The Real Property Tax File was started in 1951 and discontinued in

REQUEST FOR RECORDS RETENTION SCHEDULE  
(Continuation Sheet)

SCHEDULE NO. C-58

PAGE NO. 4

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.

1955, when it was replaced by the tabulating cards. Like the tabulating cards, it is based on the Field Book of Assessments and was used to prepare the tax bills and the tax roll (then called Tax Levy Book).

One card was prepared for each piece of property assessed. Entries show description of property, assessed valuation of land and improvements, account number, ownership record, and for each year (the cards had space for ten years' entries) the total valuation, County tax, State tax, special taxes, total tax, date paid, interest, and balance due. All information on the cards is duplicated in the Field Book of Assessments and the Tax Levy Books.

The cards are divided into a Paid File and an Unpaid File. All cards in the Unpaid file will eventually be transferred to the Paid File because of redemptions, tax sale purchases or reversion of property to the County.

RECOMMENDATION: RETAIN FOR FOUR YEARS AFTER TRANSFER TO PAID FILE, AND THEN DESTROY.

5. INCREASE AND DECREASE IN ASSESSMENTS FORM

Dates: 1951 - -  
Quantity: 7 cubic feet  
File Arrangement: Chronological  
Annual Accumulation: 1 cubic foot  
Disposable Amount: 2 cubic feet

The Supervisor of Assessments prepares a pre-numbered form in quadruplicate for each increase or decrease in assessment. (See Schedule No. ,Item 5). The first copy goes to the Tabulating Department as its authority to replace the Tabulating Cards with new cards showing the new assessment. Since 1955, the second copy has also been sent to the Tabulating Department as a spare copy. Information contained on the forms is permanently recorded in the Field Book of Assessments. The second copy is considered non-record within the meaning of the statute governing non-record material (Article 41, Section 155, Annotated Code of Maryland, 1951 Edition). The recommendation below applies only to the first copy.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

REQUEST FOR RECORDS RETENTION SCHEDULE  
(Continuation Sheet)

SCHEDULE  
NO. C-58

PAGE  
NO. 5

4.  
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.

6.

AUTHORIZATION FOR CORRECTION OF TREASURER'S AND TABULATING RECORDS

Size: 6 $\frac{1}{2}$ " x 8 $\frac{1}{2}$ "  
Dates: 1956 - -  
Quantity:  $\frac{1}{2}$  cubic foot  
File Arrangement: Alphabetical  
Annual Accumulation:  $\frac{1}{2}$  cubic foot

The Finance Department prepares a form in duplicate whenever it is necessary to correct the records of the Tabulating Department and the Treasurer. Both forms are delivered to the Tabulating Department, where one is filed, and the other is passed on to the Treasurer and filed in his office. The forms are issued in two series:

1. Numbered - for changes in the assessable basis
2. Un-numbered - for any other changes

Entries show description of property, name and address of owner, explanation of correction, statement of correction, date, signature of authorized person, a certificate to be completed by the Tabulating Department stating that the correction has been computed, punched, interfiled, and forwarded to the Treasurer, and a certificate to be completed by the Treasurer stating that the correction has been posted to the rolls, billed, mailed, and cleared for refund.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.