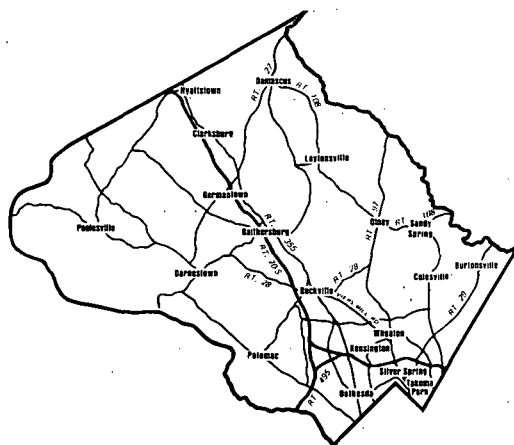


Records Retention and Disposition Manual

**for
Records Required by
Montgomery County Public Schools**



**Department of Educational Media and Technology
Montgomery County Public Schools
Rockville, Maryland
1976**

INTRODUCTION

This is Part II of the Records Retention and Disposition Manual for Public School Systems of Maryland which was issued in the spring of 1973 by the Maryland State Department of Education.

Part II applies only to local records of Montgomery County Public Schools (those records not prescribed by the Maryland State Department of Education).

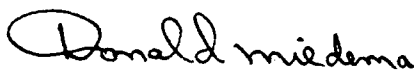
Part II is being issued at this time strictly on a test basis. While the retention periods contained herein may be used at once, it is recognized that this part of the manual is not complete and will require change.

Therefore, please make recommendations for changes, additions, or deletions in writing (do not telephone) to my office by December 31, 1976. In each case, state clearly the reason for the recommendation and very carefully identify the record or records being discussed. Be specific; general statements are of little value in developing the Records Retention and Disposition Manual.

If signed statements are not received prior to December 31, 1976, I will consider that you approve the manual as is.

The additions, deletions, and changes recommended will be carefully considered, and, where feasible, included in the permanent manual which will be issued early in 1977.

I ask that responsible officials address themselves particularly to those records classified as "permanent" or "indefinite." Permanent means exactly that, and in my opinion there are very few Montgomery County Public Schools records that qualify for this classification. Indefinite can only mean that the officials responsible have had insufficient time to assign a meaningful retention period. I do not contemplate any records will be classified as indefinite in the permanent manual.



Donald Miedema
Deputy Superintendent of Schools

587 refers

to state schedule

7-9-87

Never approved
by MSA

RECORDS RETENTION AND DISPOSITION SCHEDULE, PART II

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PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Office: Superintendent of Schools

Index No. 2.0

Department:

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Legal	Yes	Superintendent	P	5
2		School Files	Yes		3	1
3		Locally Developed Curriculum Projects		Curriculum and Instruction	P	3
4		Council on Instruction Minutes		Deputy Superintendent	10	2
5		Task Force and Communittees		Deputy Superintendent	5	2
6		Executive Staff	Yes	Superintendent	10	3
7		"Office" Files			NR	2
8		Correspondence (Gen)			NR	5
9		State BOE Minutes		Superintendent	NR	2
10		State Department of Education Correspondence			NR	3
11		State Superintendents' File			NR	3

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Superintendent of Schools (cont.)

Index No. 2.0A

Department: Board of Education

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Memoranda Addressed to the Board		Board Office	20	
2		Board Folder Materials		Board Office	20	
3		Correspondence signed by Board Presidents and Members		Board Office	5	
4		Bound copies of minutes from 1839 to present as well as microfilms of those minutes		Board Office	P	
5		Shorthand of Board Meetings and Conferences	Yes	Board Office	20	
6		Tape Recordings of Board		Board Office	20	
7		Copies of Correspondence not Directed to or Sent from Board of Education		Board Office	3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Superintendent of Schools (cont.)
 Department: Human Relations (cont.)
 Division:

Index No. 2.0C

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
16		Community Organizations – Addresses		Human Relations	US	
17		Government and Institution Organizations		Human Relations	2	
18		Committee on Minority Relations		Human Relations	3	
19		Commission on Women, Montgomery County		Human Relations	2	
20		Task Force on Women		Human Relations	3	
21		Black Coalition of Montgomery County		Human Relations	2	
22		Human Relations Liaison Committee		Human Relations	2	
23		Hispanic Task Force		Human Relations	2	
24		Committee on Community Organizations		Human Relations	2	
25		General Committee File		Human Relations	2	
26		Department Correspondence		Human Relations	2	
27		Department Accounts – Recording of		Human Relations	3	
28		Department Budget		Human Relations	2	
29		Department Travel In-County		Human Relations	3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Superintendent of Schools (cont.)

Index No. 2.0C

Department: Human Relations (cont.)

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
29		Department Travel Out-of-County		Human Relations	3	
30		Department Personnel		Human Relations	DE+5	
31		Department Meeting Files Dr. Miedema Board of Education H.R. Teacher Specialist Staff Meetings General		Human Relations Human Relations Human Relations Human Relations Human Relations	3 2 2 2 2	
32		Statistical Files		Human Relations	US	
33		Report Files		Human Relations	US	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.0B

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Case Files	Yes	Ombudsman's Office	10	
2		Correspondence (Gen)		Ombudsman's Office	3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Superintendent of Schools (cont.)
 Department: Human Relations
 Division:

Index No. 2.0C

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	255-4	EEO Complaint Form	Yes	Human Relations	5	
2		EEO Case File	Yes	Human Relations	5	
3		EEO Rules and Regulations		Human Relations	US	
4		EEO Handbook		Human Relations	US	
5		Affirmative Action Guidelines		Human Relations	US	
6		EEO General Correspondence		Human Relations	3	
7		School Correspondence		Human Relations	2	
8		School Crisis Situations — Log of	Yes	Human Relations	3	
9		Human Relations Training Correspondence		Human Relations	US	
10		Human Relations Training Workshops		Human Relations	US	
11		Human Relations Training Consultants		Human Relations	2	
12		Human Relations Training Workshop Evaluation Forms		Human Relations	2	
13		Human Relations Training Materials		Human Relations	US	
14		Human Relations Training References and Resources		Human Relations	US	
15		Community Organizations — Correspondence		Human Relations	2	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Superintendent of Schools (cont.)
 Department: Research
 Division:

Index No. 2.0D

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	495-1	Request for Research Activity		Research	5	
2		Research Reports		Research	7	7
3		Computer Printouts of Survey Results		Research	5	
4		Correspondence Regarding Authorization to Conduct Research Program		Research	5	
5		Annual Report		Information	10	10
6		Student Address File		Research	1	
7		Completed Survey Forms	Yes	Research	NR	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Superintendent of Schools (cont.)
 Department: Department of Association Relations
 Division:

Index No. 2.0E

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	430-41	Grievance (MCEA)	Yes	Association Relations	10	1
2	430-42	Admin. Complaint (MCEA-MCCSSE)	Yes	Association Relations	10	1
3	445-8	Grievance (MCCSSE)	Yes	Association Relations	10	1
4		General Correspondence		Association Relations	2	
5		Negotiations Files Agreements (MCEA-MCCSSE)		Association Relations	10	2
6		Arbitration Awards		Association Relations	10	1
7		Associations (MCEA-MCCSSE-MCFT)		Association Relations	10	1
8		Federal Negotiations		Association Relations	10	1
9		Impasse-Mediation		Association Relations	10	1
10		Parameters (MCCSSE)		Association Relations	10	1
11		Quarterly Reports on Grievances	Yes	Association Relations	10	1
12		State Negotiations		Association Relations	10	1
13		Supporting Services Elections		Association Relations	10	1
14		Wage-Price Freeze		Association Relations	10	1

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Superintendent of Schools (cont.)

Index No. 2.0F

Department: Federal, State, and Private Grants

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Proposal Application Forms		PADFASP	P	3
2		Grant Contracts/Letters of Agreement		PADFASP	P	3
3		Proposals (funded)		PADFASP	P	3
4		Proposals (not funded)		PADFASP	5	
5		Project Evaluations		PADFASP	P	
6	Bd. Act. No.	Board Authorization (resolution) to Apply for Funds		PADFASP	P	
7	Bd. Act. No.	Board Authorization (resolution) to Receive and Expend Supplemental Funds and/or Establish Positions		BAFS	P	5
8	Bd. Act. No.	Board Authorization (resolution) to Transfer Funds		BAFS	P	5
9	Bd. Act. No.	Board Authorization (resolution) Related to Federal Funding		PADFASP	P	5
10	280-59	Data to Establish MCPS Project Number for Supported Programs		PADFASP	P	
11		Supported Project Termination Notice		PADFASP	1	
12		Copies of Federal and State Legislation		PADFASP	5	
13		Federal and State Grant Application Guidelines		PADFASP	5	
14		Manual of Procedures for Supported Programs		PADFASP	P	
15		Catalog of Federal Education Assistance Programs		PADFASP	3-5	
16		Catalog of Federal Domestic Assistance		PADFASP	3-5	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.0F

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
17		Correspondence – General		PADFASP	3	
18		Correspondence – Financial		PADFASP	UA	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Superintendent of Schools (cont.)
 Department: Information
 Division:

Index No. 2.0G

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	225-5	Superintendent's Bulletin		NR	3	
2		Learning		NR		
3		Various Information Publications		NR		
4		Correspondence		INFO		
5		Request for Item to Be Included in Superintendent's Bulletin		NR		

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.1

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Executive Staff Memos	Yes	Associate Supt. Instructional Services	3	
2		Miscellaneous Correspondence	Yes	Associate Supt. Instructional Services	3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)
 Department: Educational Media and Technology
 Division: Educational Materials Laboratory

Index No. 2.1A

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	365-8	Multiple Title Order Forms			5	
2		Correspondence			3	
3		Memorandums			3	
4		Book Catalog-Author			US	
5		Microfiche			US	
6		Magazine			3	
7		Microfilm			US	
8		Shelf List			US	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)
Department: Educational Media and Technology (cont.)
Division: Central Film Library

Index No. 2.1B

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Correspondence with Film Distributors			5	
2		General Correspondence			3	
3		Media Booking Calendars			3	
4		School Usage Media Records			3	
5		Film Catalogs			US	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.1C

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	202-4A	Requisitions for Printing			3	
2	202-4B	Graphic Arts and Clerical Services			3	
3		Originals of Materials That May Be Reprinted			US	
4		Photographs and Drawing Historical Value			P	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER 582 for Local Records

Office: Associate Superintendent for Instructional Services (cont.)
 Department: Educational Media and Technology (cont.)
 Division: Engineering

Index No. 2.1D

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Technical Materials			3	
2		Equipment Replacement			3	
3		Equipment			LOE	
4		Capitol Budget Account			3	
5		Supply Account			3	
6		Bid Specifications for New Color Equipment			3	
7		Budget			3	
8		Delayed Broadcast Tapes			3	
9		WETA Manuals, etc. Distribution to Schools			3	
10		Equipment Requests for Information			3	
11		Equipment Correspondence from Vendors			3	
12		Equipment Usage Reports			3	
13		Inter-Office Correspondence			3	
14		Video Tap Loans to Schools			5	
15		Maintenance Records			LOE	
16		Memorandums-Principals, Librarians, etc.			3	
17		Newspaper articles — General			3	
18		Off-air Recording Records			3	
19		Program Correspondence			3	
20		Program Requests			3	
21		Receipts — Equipment Loaned and and Returned			3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)
 Department: Educational Media and Technology (cont.)
 Division: Engineering (cont.)

Index No. 2.1D

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
22		School Correspondence — miscellaneous			3	
23		School Equipment Evaluations			3	
24		School Equipment Replacements			3	
25		Schools With VTR Equipment			US	
26		Specifications — School MATV and Studio Space			US	
27		Video Tapes General Correspondence — Dubbing, Erasing, Evaluating, etc.			3	
28		Minutes of Meetings With Department Director			3	
29		Minutes of Engineering Staff Meetings			3	
30		Records on Engineering Staff Personnel			DE+5	
31		WETA Administrative			3	
32		WETA Instructional Budget Committee			3	
33		Masters of Programs Produced			3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)
Department: Educational Media and Technology (cont.)
Division: Evaluation and Selection

Index No. 2.1E

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Correspondence			3	
2	365-25	Record of Evaluation and Selection Approval Cards			US	
3		Publications – 1) Bibliographies 2) Approved Textbook Lists 3) Approved Instructional Materials List			US	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)
 Department: Educational Media and Technology (cont.)
 Division: Processing

Index No. 2.1F

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Cross Reference Index to the Vendor Invoice Files			3	
2	365-8	E.S.E.A. Title II (MCPS) Multiple Copy Order Forms: Disbursement			3	
3	365-8	E.S.E.A. Title II (MCPS) Multiple Copy Order Forms: Encumbrance			3	
4	365-19	E.S.E.A. Title II (MCPS) Purchase Approval for Media Center Materials			3	
5		E.S.E.A. Title II (MCPS) School Ledgers			7	
6		E.S.E.A. Title II (MCPS) Vendor Invoice File			7	
7		E.S.E.A. Title II (State) Account Ledger			3	
8		E.S.E.A. Title II (State) Authorization Forms			3	
9		E.S.E.A. Title II (State) Monthly Shipping Reports			15	
10	365-8	E.S.E.A. Title II (State) Multiple Copy Order Forms: Disbursement			7	
11	365-8	E.S.E.A. Title II (State) Multiple Copy Order Forms: Shipping			7	
12	235-26	E.S.E.A. Title II (State) Purchase Order Encumbrance File			3	
13		E.S.E.A. Title II (State) School Fund Balance Report			3	
14		E.S.E.A. Title II (State) School Ledgers			7	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)
 Department: Educational Media and Technology (cont.)
 Division: Processing (cont.)

Index No. 2.1F

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
15		E.S.E.A. Title II (State) Vendor Invoice File			7	
16		Frederick Accounts Ledger			5	
17		Frederick Authorization Forms			3	
18		Frederick Billing File			3	
19	365-8	Frederick Multiplicopy Order Forms: Encumbrance			5	
20	365-8	Frederick Multiple Copy Order Forms: Shipping			3	
21	235-26	Frederick Purchase Order File			3	
22		Frederick School Ledger			7	
23		Frederick Statistical Reports			Perm.	
24		Frederick Vendor Invoice File			7	
25		Media Center Account Freight and Adjustment Cards			3	
26		Media Center Account Ledgers of Account Fund Balances			3	
27	365-8	Media Center Account Multiple Copy Order Forms: Disbursement			3	
28	365-8	Media Center Account Multiple Copy Order Forms: Encumbrance			3	
29	365-19	Media Center Account Purchase Approval for Media Center Materials			3	
30	235-26	Media Center Account Purchase Order File			5	
31		Media Center Account Reserve Fund Ledgers			7	

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Associate Superintendent for Instructional Services (cont.)
Educational Media and Technology (cont.)
Processing (cont.)

2.1F

7

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)
Department: Educational Media and Technology (cont.)
Division: Field Services

Index No. 2.1G

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
		<u>SCHOOL FILES</u>				
1		Construction plans, program of requirements, architect's brochure			P	
2	365-31	Monthly school media center report			3	
3		Allocations to media centers			15	
4		Annual Reports — Media Center			P	
5		State Annual Reports			P	
6		Encyclopedia Inventory			US	
7		Extended hours reports			3	
8		Summer School reports			3	
9		School visits			10	
10	235-1	Periodical Orders			3	
11		Surveys			10	
		<u>STATISTICAL FILES</u>				
12		Aide lists			P	
13		Librarian lists			P	
14		Current lists of personnel, librarians, aides, etc.			US	
15		Encyclopedia replacements			15	
16		Encyclopedia inventory			US	
17		Magazines — lists, etc.			15	
18		Monthly report breakdown			10	
19		Title II — Report to State, Projects, Allocations, etc.			7	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)
 Department: Educational Media and Technology (cont.)
 Division: Field Services (cont.)

Index No. 2.1G

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
20		Allocations to schools by Area			10	
21		Magazine Order Forms from Schools			3	
22		Office Forms			US	
23		Back-up on budget			5	
24		Back-up on annual report			5	
25		Enrollment figures			10	
26		Facilities information — air-conditioning, carpeting, telephones, etc.			10	
27		Agendas and Minutes for Division Staff Meetings			3	
28		Personnel Information Sheets			DE	
29		Back-up Information for Bids — Supplies, Magazines, Media Center Furniture, etc.			5	
30		Committee Members — Processing Center, Media Skills, Advisory, Planning, etc.			5	
31		Certification Information			10	
32		Memorandums Sent			3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)

Index No. 2.1H

Department: Educational Media and Technology (cont.)

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Correspondence File				3
2		Minutes of Steering Committee				3
3		Budget Back-Up Information				5
4		Annual Report Back-Up Information				5
5		(Title III Orders)				7
6		School Inventory of Instructional and Non-Instructional Equipment				US

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)

Index No. 2.11

Department: Pupil and Program Appraisal

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	340-7	Pupil Test Record AB	Yes	PPA Office and School	P	Permanent on student test record
2		School Test Data Output	Yes	PPA Office and School	P	
3		Area Test Data Output	Yes	PPA Office and Area	P	
4		County Test Data Output	No	PPA Office	P	
5		Annual Test Report	No	PPA Office	P	
6		Special Reports (a) data studies (b) specific analysis	Varies	PPA Office	10	
7		Correspondence — re: Technical aspect — testing program	No	PPA Office	10	
8		Correspondence — re: Policy aspects of testing program	No	PPA Office	10	
9		Program Evaluation Reports	No	PPA Office	10	
10		Miscellaneous Correspondence	Yes	PPA Office	3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Instructional Services (cont.)

Index No. 2.1J

Department: Curriculum and Instruction

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Curriculum Documents (includes Courses of Study and supplements of all kinds to Courses of Study		Curriculum & Instruction	US	
2		Minutes, correspondence, etc. in support of Courses of Study and their supplements		Curriculum & Instruction	US	
3		General Departmental Correspondence		Curriculum & Instruction	3	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.2

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Executive Staff Memos	Yes	Associate Supt. for Admin.	3	
2		Miscellaneous Correspondence	Yes	Associate Supt. for Admin.	3	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.2A

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Correspondence	Yes	Supplementary Education	5	
			No	Supplementary Education	3	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER 582 for Local Records

Office: Associate Superintendent for Administration (cont.)
Department: Supplementary Education and Services (cont.)
Division: Pupil Services

Index No. 2.2B

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	311-30	Notification of Action By Committee	Yes	Pupil Services	P	Pupil—Age 21
2		Report of Kindergarten Screening	No	School	5	
3	270-1	Notice and Summary of Parent Conference	No	School	Graduation	
4	70-29 (CMHS)	Referral to Child Mental Health	Yes	School	Graduation	
5		Individual Functioning Level Data Sheet-Special Education	No	Supple. Ed.	Graduation	
6	280-48	Request for Reimbursement	No	Area Office	5	
7	335-44	Report of Suspected Child Abuse/Neglect	No	School	3	
8	560-18	Request for Withdrawal	No	School	Pupil—Age 21	
9	335-43	Follow-Up on Withdrawal (Code 37)	No	School	Pupil—Age 21	
10	MSDE	Referral for Vocational Rehabilitation	No	School	Graduation	
11	311-20	Referral of Partially Seeing Children	No	School	P	
12		Follow-Up on Transfer Students	No	Pupil Services	5	
13		Transfers by Reason for Annual Report	No	Pupil Services	5	
14		Transfers by Name	No	Pupil Services	5	
15	335-45	Request to Transfer Outside Attendance Area	No	Pupil Services	3	
16		Request for Special Program Placement	No	Pupil Services	3	
17	335-1	Formal Referral to Pupil Services	Yes	Pupil Services	Pupil—Age 21	Graduation
18	335-11	Pupil Personnel Workers Weekly Report	No	Pupil Services	NR	
19		Psychological Data Sheet	Yes	Pupil Services	5	
20		Work Sheet for Psychological Report	Yes	Pupil Services	5	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Administration (cont.)
Department: Supplementary Education and Services (cont.)
Division: Pupil Services (cont.)

Index No. 2.2B

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
21		Parent Permission for Psychological Evaluation	Yes	Pupil Services	Pupil—Age 21	
22	335-10	Parent Authorization to Release Information	Yes	Psych. Services	Pupil—Age 21	
23	335-38	Tuition Assistance for Non-Public Schools	Yes	Psych. Services	Pupil—Age 21	
24	335-8	Referral to Psychological Services	Yes	Psych. Services	Pupil—Age 21	Graduation
25	560-6	Report of Suspension	No	Psych. Services	5	Graduation
26	311-27	Application for Special Class Placement	Yes	Psych. Services	Pupil—Age 21	
27	335-12	Summary Report of Pupil for Special Placement	Yes	Psych. Services	Pupil—Age 21	
28	335-13	Application for Catch-up Class	Yes	Psych. Services	Pupil—Age 21	
29	335-9	Pupil's Psychological Information Record	Yes	Psych. Services	Pupil—Age 21	
30	335-6	Referral to Juvenile Services	Yes	Psych. Services	Pupil—Age 21	
31	280-86	Coordinator's Weekly Itinerary	No	Psych. Services	NR	
32	565-6	Student Application-Area Vocational Technical Program	No	School	Graduation	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Administration (cont.)
Department: Supplementary Education and Services (cont.)
Division: Special Education

Index No. 2.2C

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Annual Report on Speech and Hearing		Special Ed.	3	7
2	Inst. 156-23	Summary Request for State Aid for Severely Handicapped Pupils in Nonpublic Schools		Pupil Placement	3	7
3	Inst. 015-19	Request for Approval of State Aid for Handicapped Children in Nonpublic Schools		Pupil Placement	3	7
4		Special Aid to Handicapped Children Report of Pupil Progress		Pupil Placement	3	7
5	Inst. 156-1	Summary of Request for Approval of Special Programs for Handicapped Children in Maryland Public Schools		Special Ed.	3	7
6	Inst. 156-31 771	Request for Approval of State Aid for Handicapped Children in Nonpublic Schools (Excess Cost Cases)		Pupil Placement	3	7
7	A&F Form	Request for Approval of Special PGMS for Handicapped Children in Maryland Nonpublic Schools		Pupil Placement	3	7
8	015-35	Summary Request for Home and Hospital Instruction		Special Ed.	5	7
9	015-10	Aid to Education Budget Estimates		Special Ed.	5	7
10	015-17	Report of Actual Operating Costs for Severely Handicapped Children in Special Public Day-School Programs		Special Ed.	5	7
11		Report of Actual Operating Costs for Handicapped Children in the Special Public Day-School Programs		Special Ed.	5	7
12		Request for Evaluation		Pupil Folder	Graduation	Until pupil graduates
13	MCPS 311-28	Referral for Special Class		Pupil Folder	Graduation	Until pupil graduates

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Administration (cont.)
Department: Supplementary Education and Services (cont.)
Division: Special Education (cont.)

Index No. 2.2C

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
14	311-45 311-58	Summary Report of Pupil for Special Placement		Pupil Folder	Graduation Graduation	Until pupil graduates
15		Evaluation Review		Pupil Folder	Graduation	Until pupil graduates
16		Permission for Special Class Placement		Pupil Folder	Graduation	Until pupil graduates
17		Placement Review Conference		Pupil Folder	Graduation	Until pupil graduates
18	MCPS 311-24	Report of Observations, Consultations, Services, Student Activities and School Communications		Vision Office	Graduation	Until pupil graduates
19	MCPS 270-1	Notice and Summary Conference		Vision Office	Graduation	Until pupil graduates
20	MCPS 365-14	Request for Instructional Materials for Visually Handicapped		Vision Office	3	3
21		Eye Report for Children with Visual Problems		Vision Office	Graduation	Until pupil graduates
22	MCPS 311-20	Checklist for Use in Referral of Partially Seeing Children		Vision Office	Graduation	Until pupil graduates
23	MCPS 311-5	Cumulative Record: Speech and Hearing Therapy		Folder Kept by Therapist	Termination of Service	Until service terminates
24	MCPS 311-6	Worksheet for Speech and Hearing Therapist		Folder Kept by Therapist	Termination of Service	Until service terminates
25	MCPS 311-11	Record of Speech and Hearing Screening		Folder Kept by Therapist	Termination of Service	Until service terminates
26	MCPS 311-2	Speech and Hearing Referral Screening		Cumulative Folder	Termination of Service	Until service terminates
27	MCPS 311-7	Summary of Speech and Hearing Therapy		Cumulative Folder	Termination of Service	Until service terminates

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.2C

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
28		Application for Auditory Services Program		Cumulative Folder	Termination of Service	Until service terminates
29	335-46	Standard Record Form Hearing Impaired Students		Cumulative	Pupil—Age 21	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Administration (cont.)
Department: Supplementary Education and Services (cont.)
Division: Title I

Index No. 2.2D

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		AVC Daily Attendance of Handicapped Children in Schools Supported by State			P	
2	OE43893	Project Summary (Migratory Children)			P	
3		Criteria for Demonstrating Comparability			3	
4	ESEA Title I 1 Rev. 72	Application for Grant (Educationally Deprived)			3	
5	1-8-70	Project Amendment Application			P	
6	10 Rev. 2/68	Project Financial Statement			P	
7		Letter of Acknowledgment			P	
8	OE43761	Annual Survey of Children in Institution not Supported by State			P	
9	311-53	Survey of Volunteer Services			3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Administration (cont.)
 Department: Supplementary Education and Services (cont.)
 Division: Head Start

Index No. 2.2E

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	*OS-185	Applicant Agency Basic Information	No	Head Start	5	
2	*OS-187	Delegate Agency Summary Information	No	Head Start	5	
3	*OS-188	Applicant Agency Program Information	No	Head Start	5	
4	*OS-189	Budget Forms, Sections I, II and III	No	Head Start	5	
5	*OS-190	Cash Needs and Disbursement Schedule	No	Head Start	5	
6	*HEW 441	Assurance of Compliance with H.E.W. Regulation under Title VI of the Civic Rights Act of 1964	No	Head Start	5	
7	*OEO242	Grantee Staff Salary Report	No	Head Start	5	
8		Head Start Registration	Yes	Head Start	10	
9		Casework Information Form	Yes	Head Start	3-5	
10		Family Profile Form	Yes	Head Start	3-5	
11		Summary of Monthly Activity Social Service	No	Head Start	1-2	
12	MCPS 447-9	Position Action Request	No	Personnel	UE	
13		Correspondence	Yes No		5 3	
	*Federal Forms for Annual Application and Reporting					

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Administration (cont.)
Department: Supplementary Education and Services (cont.)
Division: Placement Section

Index No. 2.2F

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	MCPS 335-41	Application for Tuition Assistance		Pupil Placement	Under—Age 21	
2	MCPS 335-42	Application for Tuition Continuation		Pupil Placement	Under—Age 21	
3	MCPS 311-36	Authorization to Release Information (Pupil Placement)		Pupil Placement	Under—Age 21	
4	MCPS 215-17	Application of Reimbursement of Transportation		Pupil Placement	Under—Age 21	
5	MCPS 311-30	Notification of Action		Pupil Placement	Under—Age 21	
6	MCPS 335-4	Referral for Tuition Assistance for NonPublic School		Pupil Placement	Under—Age 21	
7	MCPS 311-29	Pupil Progress Report (Pupil Services)		Pupil Placement	Under—Age 21	
8	MCPS 311-63	Health Inventory Form		Pupil Placement	Under—Age 21	
9	MCPS 335-40	Pupil Progress Report (Private Placement)		Pupil Placement	Under—Age 21	
10		Placement Letter Montgomery County Public Schools Special Education		Pupil Placement	Under—Age 21	
11		County Funds Approved		Pupil Placement	Under—Age 21	
12		State Funds Approved		Pupil Placement	Under—Age 21	
13		State Tuition Continued		Pupil Placement	Under—Age 21	
14		Pre School Letter		Pupil Placement	Under—Age 21	
15		Psychological Instruction Letter		Pupil Placement	Under—Age 21	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.2F

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
16		Tuition Approved – School to Be Decided		Pupil Placement	Until—Age 21	
17		Conference Forms Case Notes		Pupil Placement	Until—Age 21	
18		Withdrawal Form (Private School)		Pupil Placement	Until—Age 21	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Office: Associate Superintendent for Administration (cont.)
Department: Adult Education (Summer School)
Division:

Index No. 2.2G

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	320-5	Record of Registration and Registration Fees		Adult Ed.	3	
2	320-2	Biweekly Salary Voucher for Adult Education Teacher		Adult Ed.	3	
3	320-1	Biweekly Report of Attendance		Adult Ed.	3	
4	460-27a	Employment Application	Yes	Adult Ed.	3	
5	445-16	Professional Reference <u>Summer School</u>	Yes	Adult Ed.	3	
6	325-10	Summer School Registration Form		Adult Ed.	NR	
7	325-15-1	Secondary Summer School Report Card		Adult Ed.	3	
8	325-15-3	Summer School Secondary Rapid Reading Report		Adult Ed.	3	
9	325-14	Elementary Summer School Report Card		Adult Ed.	3	
10	325-1	Summer School Request for Refund		Adult Ed.	UA	
11	325-3	Summer School Change of Center or Course		Adult Ed.	1 NR	
12	325-4	Summer School Request and Approval of Tuition Waiver		Adult Ed.	3	
13	325-11	Secondary Summer School Referral Data Form		Adult Ed.	NR	
14	325-16A	Secondary Summer – Official Transcript		Adult Ed.	3	
15	325-19	Summer School – Secondary Student Clearance Record		Adult Ed.	UA	
16	346-2	Summer School – Daily Attendance Record		Adult Ed.	UA	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.2F

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
17	346-5	Secondary Summer School Summary Attendance/Grade Sheet		Adult Ed.	NR	
18	346-9	Secondary Summer School Teacher's Summary Report		Adult Ed.	3	
19	346-12	Summer School – Class Roster		Adult E.	3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Personnel Services

Index No. 2.3

Department:

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	560-11	Results of TB Testing	Yes	Personnel	3	
2	285-9	Annual Health Certificate Report	Yes	Personnel	3	
3		Executive Staff Memos	Yes	Personnel	3	
4		Miscellaneous Correspondence	Yes	Personnel	5	
5		School Calendar Information		Personnel	P	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Personnel Services (cont.)

Index No. 2.3A

Department: Professional Personnel

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	460-27	A&S Application File				
2		Employment Application		Personnel	3	
3		Reference Form	Yes	Personnel	3	
4		College Transcripts		Personnel	3	
5		Credentials	Yes	Personnel	3	
6		Resumes	Yes	Personnel	3	
7		Interview Material	Yes	Personnel	3	
8		Correspondence	Yes	Personnel	3	
9		Payroll Vouchers		Personnel	3	
10		Miscellaneous Correspondence		Personnel	5	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER 582 for Local Records

Office: Associate Superintendent for Personnel Services (cont.)
 Department: Professional Personnel (cont.)
 Division: Teacher Personnel

Index No. 2.3B

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	460-27A	Employment Application (Applicants)	Yes	Personnel	3	
2	445-16	Professional Reference Forms (Applicants)	Yes	Personnel	3	
3		Credentials or Placement Files (Applicants)	Yes	Personnel	3	
4		Transcripts (Applicants)	Yes	Personnel	3	
5	460-64	Supplementary Employment Application— Elementary—Reading Questionnaire (Applicants)	Yes	Personnel	3	
6	430-64	Applicant's Statement on Drug Abuse (Applicants)	Yes	Personnel	3	
7		English Transcript Review Form (Applicants)	Yes	Personnel	3	
8		Interview Form (Applicants)	Yes	Personnel	3	
9	430-67	Principal's Evaluation of Teacher Applicant (Applicants)	Yes	Personnel	3	
10	430-47	Application for Secondary Resource Teaching Positions	Yes	Personnel	DE+5	
11	430-48	Reference for Applicant for Secondary Resource Position	Yes	Personnel	DE+5	
12	430-49	Recommendation for Appointment to Secondary Resource Position	Yes	Personnel	DE+5	
13	430-50	Interviewer's Report Concerning Candidate for Resource Teacher	Yes	Personnel	DE+5	
14	445-07	Recruitment Information Card	Yes	Personnel	DE+5	
15	445-17	Request for Employment or Termination of Substitute		Personnel	DE+5	
16		Interview Schedule		Personnel	NR	
17		Recruitment Schedule		Personnel	US	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.3B

[illegible]

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Personnel Services (cont.)
 Department: Professional Personnel (cont.)
 Division: Salary Administration and Records

Index No. 2.3C

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	445-13	Personnel Action Notice		Personnel	5 years after termination	
2	445-3	Salary Information Notice		Personnel	5 years after termination	
3	401-4	Notice of Change of Employment Status		Personnel	5 years after termination	
4	460-28	Transfer Requests		Personnel	5 years after termination	
5	460-36	Authorization to Transfer Teachers		Personnel	5 years after termination	
6	430-9	Long Term Leave; Adoption, Military, Personal Illness, Family Illness		Personnel	5 years after termination	
7	430-21	Professional Leave After 3 Years Service		Personnel	5 years after termination	
8	430-22	Professional Leave After 1 Year of Service		Personnel	5 years after termination	
9	430-23	Leave for Overseas Teaching		Personnel	5 years after termination	
10	430-24	Leave for Teaching in College or University		Personnel	5 years after termination	
11	430-25	Leave for Academic Study		Personnel	5 years after termination	
12	430-26	Leave for Exchange Teaching		Personnel	5 years after termination	
13	430-28	Leave for Unusual and Imperative Reasons		Personnel	5 years after termination	
14	430-65	Request for Maternity Leave		Personnel	5 years after termination	
15	425-10	Leave Approval (3/4 Sick Leave)		Personnel	5 years after termination	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Personnel Services
 Department: Professional Personnel (cont.)
 Division: Salary Administration and Records (cont.)

Index No. 2.3C

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
16	430-7	Contractual Agreement for Professional Leave	Yes	Personnel	5 years after termination	
17	460-37	Contract — Provisional Certificate		Personnel	5 years after termination	
18		Regular Contract (State Form)		Personnel	DE+5	
19	445-1	Change in Personnel Information		Personnel	DE+5	
20		Employment Record Card		Personnel	DE+5	
21		Employment Verification Card		Personnel	DE+5	
22		PERSONNEL FILE — PROFESSIONAL	Yes	Personnel	DE+5	
23	425-1	Evaluation Form (teacher)	Yes	Personnel	DE+5	
24	430-5	Evaluation Form (A&S)	Yes	Personnel	DE+5	
25	430-45	Evaluation Form (counselor)	Yes	Personnel	DE+5	
26	430-51	Application for Certificate		Personnel	DE+5	
27		College or University Transcripts		Personnel	DE+5	
28		Grade Slips		Personnel	DE+5	
29	440-5	Credit Applicability Verification		Personnel	DE+5	
30	456-2	Record of In-Service Education, Training		Personnel	DE+5	
31	475-3	Request for Placement on BA+15 Salary Schedule		Personnel Personnel	DE+5 DE+5	
32	475-2	Request for Placement on MA and MA Equivalent Schedule		Personnel	DE+5	
33	475-1	Request for Placement on MA+30 Salary Schedule		Personnel	DE+5	
34	460-27	Employment Application		Personnel	DE+5 DE+5	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER 582 for Local Records

Office: Associate Superintendent for Personnel Services (cont.)
 Department: Professional Personnel (cont.)
 Division: Salary Administration and Records (cont.)

Index No. 2.3C

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
35		Employment References	Yes	Personnel	DE+5	
36		Credentials	Yes	Personnel	DE+5	
37	430-47	Application for Secondary Resource Teacher		Personnel	DE+5	
38	430-49	Recommendation for Appointment To Resource Teacher		Personnel	DE+5	
39	460-29	Employment Verification Form		Personnel	DE+5	
40		Committees Assignments			3	
41		Employment Letter			DE+5	
42		Miscellaneous Correspondence			5	
43		Monthly Personnel Reports to Board of Education		Personnel	P	
44		Appointments Committee Minutes	Yes	Personnel	3	
45		Anniversary Cards		Personnel	DE	
46		Verification Log Card		Personnel	3	
47		Salary Schedules (Copy for each year)		Personnel	P	
48		School System Directories		Personnel	P	
49		Data A – Monthly Reports		Personnel	US	
50		Payroll Vouchers	Yes	Personnel	3	
51		Miscellaneous Correspondence		Personnel	5	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.3D

Division:

[illegible]

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Personnel Services (cont.)
Department: Supporting Services Personnel (cont.)
Division: Recruitment and Employment

Index No. 2.3E

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	MCPS 225-5	Request for Item to Be Included in the Superintendent's Bulletin		Personnel	NR	
2	MCPS 310-73	Position Control Special Report Request		Systems Operations	NR	
3	MCPS 430-64	Applicant's Statement on Drug Abuse		Personnel	DE+5	
4	MCPS 445-10	Applicant Reference Form		Personnel	DE+5	
5	MCPS 447-9	Position Action Request		Personnel	NR	
6	MCPS 460-10	Testing Profile	Yes	Personnel	3	1
7	MCPS 460-27B	Employment Application	Yes	Personnel	3 or DE+5	
8		ADDENDUM To Employment		Personnel	3 or DE+5	
9		Application for Summer Employment			NR	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Personnel Services (cont.)

Index No. 2.3F

Department: Supporting Services Personnel (cont.)

Division: Classification, Examination, and Records

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	TRS No. 1	Teacher's Retirement System of the State of Maryland		Teacher's Retirement System		3 years after termination
2	MCPS 401-4	Notice of Change in Employment Status		Personnel	DE+5	
3	MCPS 425-3	Evaluation Form	Yes	Personnel	DE+5	
4	MCPS 285-2	Certification of Health Examination	Yes	Personnel	DE+5	
5	MCPS 430-9	Request for Long Term Leave			DE+5	
6	MCPS 430-21	Leave for Professional Employment After Three Years Satisfactory Service		Personnel	DE+5	
7	MCPS 430-22	Leave for Professional Improvement After One Year Satisfactory Service		Personnel	DE+5	
8	MCPS 430-23	Leave for Overseas Teaching/ Employment		Personnel	DE+5	
9	MCPS 430-26	Leave for Exchange Teaching/ Employment		Personnel	DE+5	
10	MCPS 430-28	Leave for Unusual or Imperative Reasons		Personnel	DE+5	
11	MCPS 430-64	Applicants Statement on Drug Abuse		Personnel	DE+5	
12	MCPS 430-65	Request for Maternity Leave		Personnel	DE+5	
13	MCPS 440-16	Report of Medical History	Yes	Personnel	DE+5	
14	MCPS 445-1	Change in Personnel Information		Personnel	DE+5	
15	MCPS 445-3	Salary Information Notice	Yes	Personnel	DE+5	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Personnel Services (cont.)
Department: Supporting Services Personnel (cont.)
Division: Classification, Examination and Records (cont.)

Index No. 2.3F

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
16	MCPS 445-10	Applicant Reference Check Form	Yes	Personnel	DE+5	
17	MCPS 445-12	Employee History Record	Yes	Personnel	P	
18	MCPS 445-13	Personnel Action Notice	Yes	Personnel	DE+5 yrs. after termination	
19	MCPS 446-48	Request to Review Personnel File		Personnel	DE+5 yrs. after termination	
20	MCPS 446-1	Request for Transfer or Promotions		Personnel	DE+5 yrs. after termination	
21	MCPS 446-5	Information on New Employee		Personnel	DE+5 yrs. after termination	
22	MCPS 460-8	Job Description		Personnel	US	
23	MCPS 460-9	Outstanding Service Award		Personnel	DE+5 yrs. after termination	
24	MCPS 460-10	Testing Profile	Yes	Personnel	DE+5 yrs. after termination	
25	MCPS 460-17	Budget Request for New Position		Budget	NR	
26	MCPS 460-24	Identification Card		Personnel	DE+5 yrs. after termination	
27	MCPS 460-27B	Employment Application	Yes	Personnel	3 or DE+5	
28	MCPS 480-2	Notice of Termination of Employment for Supporting Services Personnel		Personnel	DE+5	
29	MCPS 560-11	Tuberculin Skin Test		Personnel	DE+5	
30	MCPS 210-1	Request for Authorization for		Budget		3

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Personnel Services (cont.)
 Department: Staff Development
 Division:

Index No. 2.3G

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Needs Assessment Data		Director's Office	3	
2	440-15	Administration Intern Logs		Director's Office	6	
3		Administration Training Program Information		Director's Office	3	
4		Contracts — Administrative Conference		Director's Office	3	
5		Rosters — Administrative Training Program		Director's Office	3	
6		Records — Administrative Competence Assessment Sessions		Director's Office	7	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Personnel Services (cont.)
Department: Staff Development (cont.)
Division: Career Counseling

Index No. 2.3H

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	440-5	Applicability Verification		Personnel	DE+5	
2	475-1	Salary Request M+30		Personnel	DE+5	
3	475-2	Salary Request MEQ		Personnel	DE+5	
4	475-3	Salary Request B+15		Personnel	DE+5	
5	440-20	Information Reply		Personnel	DE+5	
6	445-49	Information Request			NR	
7		Evaluation – Certification Area		Personnel	DE+5	
8		Evaluation – Credits – Salary		Personnel	US	
9		Certificate		Career Counseling	DE+5	
10		Credit Listing – Green Card		Career Counseling	DE+5	
11		Transcripts		Personnel	DE+5	
12		Certification Listings			US	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Personnel Services (cont.)
 Department: Staff Development (cont.)
 Division: Career Programs

Index No. 2.31

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Documents re: Ongoing Programs		Career Programs	P	
2		Agreements with Agencies — Implementations		Career Programs	P	
3		Authorization Course — Establishment and accreditation		Career Programs	P	
4		Description of Courses for Credit		Career Programs	P	
5		Course Offering Dates		Career Programs	P	
6		Rosters — Course Completions		Career Programs	P	
7		Student Teachers — Assignment		Career Programs	5	
8		Supervising Teacher's Roster		Career Programs	P	
9		Authorization Expenditure Funds		Career	UA	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services
 Department:
 Division:

Index No. 2.4

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Executive Staff Memos	Yes	Associate Superintendent for Business and Financial Services	3	
2		Miscellaneous Correspondence	Yes	Associate Superintendent for Business and Financial Services	5	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.4A

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	560-11	Results of TB Testing	Yes	Office Services	3	
2		Payroll Vouchers		Office Services	3	
3		Miscellaneous Correspondence		Office Services	3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)

Index No. 2.4B

Department: Budget Office

Division:

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Budget Request Operating Expenditures		Budget	P	
2		Budget Request by Program		Budget	P	
3		Programs Financed Through Federal, State and Private Agency Grants or Matching Funds		Budget	P	
4		Operating Budget Guidance		Budget	3	
5		Supported Projects Budget Guidance		Budget	3	
6		History of Operating Budget		Budget	5	
7		Summary of Action		Budget	5	
8		Summary of Expenditure by Object		Budget	5	
9		Supporting Services Salary Simulation	Yes	Budget	3	
10		Professional Salary Projection	Yes	Budget	3	
11		Dept.-Supt. Board and Council Manual Salary Pricing Papers for:		Budget		
		Professional Personnel	Yes		3	
		Supporting Services Personnel	Yes		3	
12		Personnel Distributions Used to Price Positions (Data A)		Budget	3	
13		Yearly Professional Termination and New Hire Report by Grade and Step		Budget	5	
14		Enrollment Projection Official October		Budget	3	
15	210-1	Request and Authorization for Movement of Operating Budget Funds Form 210-1		Budget	5	
16		Statement of Operating Transfers		Budget	3	
17		Progress Reports		Budget	P	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
 Department: Financial Services
 Division: Accounting

Index No. 2.4C

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	234-8	Warehouse Shipping List		Accounting	1	
2	280-34	Monthly Participation Report of Cafe Manager		Accounting	5	
3	230-7	Gas and Oil Withdrawal Tickets		Accounting	3	
4	280-40	Schedule of Discounts Taken		Accounting	1	
5		JVEA and AT Support		Accounting	5	
6		Statement of Transactions		Accounting	5	
7		Operating Budget Report		Accounting	5	
8		Account Summary Balance Report		Accounting	1 mo.	
9		Monthly Board Report		Accounting	5	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Office: Associate Superintendent for Business and Financial Services (cont.)
Department: Financial Services (cont.)
Division: Auditing

Index No. 2.4D

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Reports In and Out		Auditing	P	
2		Memorandums In and Out		Auditing	4	
3		Letters In and Out		Auditing	4	
		<u>Inventories Listings:</u>				
4		Furniture		Auditing	2	
5		Maintenance		Auditing	2	
6		Textbook Depository		Auditing	2	
7		Warehouse		Auditing	2	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
Department: Financial Services (cont.)
Division: Insurance and Retirement

Index No. 2.4E

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	455-4	Group Insurance Authorization			Indefinite	
2		Tax Sheltered Annuity Authorization			Indefinite	
3	285-1	Workmen's Compensation Reports			Indefinite	
4	525-2	Student Accident Reports			3 years past student's age of 21	
5		Retirement Authorizations and Records			Indefinite	
6		Student Insurance Files			3	
7		Student Insurance Bids			5	
8		Insurance Policies			Indefinite	
9		Bus, Truck and Auto Accidents			Indefinite	
10		General Liability Accident			Indefinite	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER 582 for Local Records

Office: Associate Superintendent for Business and Financial Services (cont.)
 Department: Financial Services (cont.)
 Division: Payroll

Index No. 2.4F

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Federal Project "M" Account Distribution and D Listing		Payroll	P	
2		Distribution and D Listing Social Security Quarter Reports		Payroll	P	
3		Social Security Quarter Preliminary Listing		Payroll	P	
4		Supporting Services Overtime Reports		Payroll	P	
5		Retirement Distribution Employees State		Payroll	P	
6		Retirement Distribution Teachers State		Payroll	P	
7		Employee Number Book		Payroll	P	
8		Salary Encumbrance		Payroll	1	
9		Operating Budget Report		Payroll	1	
10		Annual W/2 Detail		Payroll	7	
11		Supporting Services Master Pay		Payroll	1	
12		Professional Master Pay		Payroll	2	
13		MCEA Distribution		Payroll	P	
14		Teachers Retirement Systems -- Numbers and Rates		Payroll	Indef.	
15		TSA REports -- Prudential		Payroll	3	
16		TSA Reports -- State		Payroll	3	
17		Adult Education W-4 Forms		Payroll	P	
18		Substitute Teacher W-4 Forms		Payroll	P	
19		Home Instruction W-4 Forms		Payroll	P	
20		Lay Reader W-4 Forms		Payroll	P	
21		Adult Education Personnel Action Notices		Payroll	P	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
Department: Financial Services (cont.)
Division: Payroll (cont.)

Index No. 2.4F

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
22		Substitute Teacher Personnel Action Notices		Payroll	P	
23		Home Instruction Personnel Action Notices		Payroll	P	
24		Lay Reader Personnel Actions Notices		Payroll	P	
25		"M" Account Verification and Worksheets		Payroll	P	
26		Journal Entry Copies and Worksheets		Payroll	3	
27		Professional Update Data		Payroll	Indef.	
28		Supporting Services Update Data		Payroll	Indef.	
29		6/30 Leave Balances		Payroll	P	
30		Year-to-Date Worksheets		Payroll	P	
31		Quarterly Current Pay Listings		Payroll	7	
32		1971 Wage Freeze — All Documents		Payroll	Indef.	
33		Substitute Teacher Days Taught Cards		Payroll	6 mos.	
34		Retirement Cards, Monthly		Payroll	6 mos.	
35		Substitute Teacher Authorizations		Payroll	P	
36	430-13	Summer Workshop/Summer School Per Diem Authorizations		Payroll	P	
37		Individual Employee Payroll Folders		Payroll	P	
38		Correspondence and Procedures Files		Payroll	P	
39		Job List		Payroll	P	
40		Microfilm Index		Payroll	P	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.4G

[illegible]

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.4H

[illegible]

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
Department: School Facilities (cont.)
Division: Site Acquisition

Index No. 2.41

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Montgomery County Topographic Maps	No	Site Acquisition	P (LEA)	
2		Configuration and Ownership Maps (Large and Small) Prepared by the State Department of Assessment	No	Site Acquisition	P (LEA)	
3		Maryland National Capital Park and Planning Commission Enrollment Studies. (Prepared by Site Acquisition Staff)	No	Site Acquisition	P (LEA)	
4		Maryland National Capital Park and Planning Commission Adopted Master Plan	No	Site Acquisition	P (LEA)	
5		School Project Legal File (Deeds, Easements, Rights-of-Way)	No	Site Acquisition	P (LEA)	
6		School Project Engineering File (Surveys, Boundaries, Topographic, Soil Tests, Subdivision Plans)	No	Site Acquisition	P (LEA)	
7		School Project File (School Property Owned)	No	Site Acquisition	P (LEA)	
8		Preliminary School Project File (School Property Not Owners)	No	Site Acquisition	P (LEA)	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.4K

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Work Order File	No	Division of Maintenance	4	
2		Project Booklet and Engr. Data Pertaining to New, Renovations, and Alterations	No	Division of Maintenance	Indef.	
3		School File – Correspondence	No	Division of Maintenance	3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
Department: School Facilities (cont.)
Division: Construction

Index No. 2.4J

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	Sch. Proj. Case File	Legal Case File	No	Division of Construction	5	Indef.
2	Phase III	Certificate of Expenditure	No	Division of Construction	5	
3	306.2	Schedule of Cash Needs	No	Division of Construction	5	
4		Historical Record and Statistical Data Card	No	Division of Construction	P	
5	Sch. Proj. Case File	School Case File	No	Division of Construction	5	
6	Bid File	Offers to Bid Invitation	No	Division of Construction	4	
7	MCPS 230-9	Daily Inspection Report	No	Division of Construction	5	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.4L

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		State School Project File	No	Capital Projects Division	5	
2		I.A.C. Minutes	No	Capital Projects Division	5	
3		Preliminary State Budget	No	Capital Projects Division	5	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.4M

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	560-11	Results of TB Testing	Yes	School Services	1	
2	285-9	Annual Health Certificate Report	Yes	School Servcies	3	
3		Payroll Vouchers		School Services	3	
4		Miscellaneous Correspondence	Yes		3	

A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records

Index No. 2.4N

[illegible]

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
 Department: School Services (cont.)
 Division: Building Operations

Index No. 2.40

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Utility Cost Accounting		Operations	10	
2		Utility Usage Accounting		Operations	3	
3		Overtime Request Log		Operations	1	
4		Building Service Overtime Report		Operations	1	
5		Overtime Compilation		Operations	1	
6		Monthly Overtime Report (EEOC Compliance)		Operations	1	
7		Personnel Vacancy Report		Operations	1	
8		Enrollment in In-Service Courses		Operations	1	
9		Individual In-Service Training Record		Operations	DE+3	
10		Request for Uniforms		Operations	1	
11		Equipment Request		Operations	1	
12		Equipment Inventory		Operations	US	
13	MCPS 245-1	Fire Alarm Station Check		Operations	1	
14		Filter Order Form		Operations	1	
15		Weekly Field Supervisor's Report		Operations	1	
16		General Plant Inspection		Operations	1	
17		Summer Cleaning Progress Report		Operations	6	
18		New Products Evaluation		Operations	1	
19	MCPS 202-3	Daily Telephone Toll Record		Operations	1	
20	MCPS 235-2	Warehouse Requisition		Operations	1	1

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
 Department: School Services (cont.)
 Division: Building Operations (cont.)

Index No. 2.40

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
21	MCPS 235-1	Purchase Requisition		Operations	1	1

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
 Department: School Services (cont.)
 Division: Procurement

Index No. 2.4P

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	235-1	Copy No. 1, Requisition		Procurement	3	
2	235-1	Copy No. 4, Vendor Copy, P.O.		Procurement	5	
3	235-1	Copy No. 5, Account Copy, P.O.		Procurement	2	
4	235-4	Cancellation of Order		Procurement	5	
5	235-6	Requisition Discrepancy Report		Procurement	5	
6	235-8	Telephone Quotation		Procurement	2	
7	235-10	Invitation to Quote		Procurement	4	
8	235-12	Invitation to Formal Bid		Procurement	5	
9	235-14	Request for Check In Advance		Procurement	2	
10	235-19	Request for Change of Price/Vendor		Procurement	5	
11	235-28	Follow-up on Purchase Order		Procurement	2	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
 Department: School Services (cont.)
 Division: School Lunch

Index No. 2.4Q

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	240-20	Pick-up Receipt for Commodity Foods		Home Ec. Dept. School Cafe.	3	
2		Office Record Card		School Lunch School Cafe.	NR	
3		Menus		School Cafe.	3	
4		Special Food Service Request		School Lunch	3	
5		Daily Participation in Breakfast and Lunch Program		School Lunch	NR	
6		Inventory Totals		School Lunch	NR	
7		Direct Distribution Commodity Inventory Totals		School Lunch	NR	
8		Log for Orders		School Lunch	NR	
9		Telephone Calls		School Lunch	NR	
10		Permanent Substitute Schedule		School Lunch	NR	
11		Weekly Schedule — Supervisors		School Lunch	3	
12		Daily Mail Log		School Lunch	1	
13	240-18	Food Products Bid Test Quality Rating Record		School Lunch	3	
14		Routing Slip		School Lunch	NR	
15		Memorandum Routing Slip			NR	
16		Maryland State Department of Free and Reduced Price Lunch Needs and Potential Lunch Needs		State Department	3	
17		Direct Distribution Commodity Delivery Schedule			NR	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
Department: School Services (cont.)
Division: School Lunch (cont.)

Index No. 2.4Q

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
18		Notice of Delivery of Surplus Food			NR	
19		Notice of Delivery of Surplus Food to Private Schools		School Lunch	NR	
20		In-service Training Report		State Dept.	3	
21		Free Lunch Policy Statement		State Dept.	3	
22		Estimated Price of Lunch		State Dept.	3	
23		Estimated Price of Breakfast		State Dept.	3	
24		Direct Distribution Commodity Agreement		State Dept.	3	
25		Environmental Health Report		State Envir.	3	
26	280-34	Cafeteria Report of Participation and Receipts		Accounting School Lunch	3	3
27		Head Start Participation		Accounting School Lunch	3	
28		Participation Sheet for Breakfast Program		Accounting School Lunch	3	
29		Breakfast Production Sheet		School Cafe.	3	
30		Breakdown Report of Lunches in Parent Schools and Satellite School		Parent School School Lunch	3	
31		Day Care Lunches		Accounting School Lunch	3	
32		Satellite Meal Order		Parent Sch.	NR	
33		Satellite Lunch Count		Classroom	NR	
34	240-16	Daily Tally Sheet for Cash Lunches		School Cafe.	3	
35	240-1	Food and Supplies Inventory		School Lunch School Cafe.	3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
 Department: School Services (cont.)
 Division: School Lunch (cont.)

Index No. 2.4Q

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
36	240-9	Receipt and Inventory Record of Direct Distribution Commodities		School Lunch School Cafe.	3	
37		Maryland State Department of Education Donated Commodity Inventory Report		State Dept.	3	
38	240-4	Complaint of Purchases of Food or Equipment		School Lunch Procurement	NR	
39		Memo-School Food Service Directory		School Lunch	NR	
40		Personnel Information		School Lunch	NR	
41	240-30	Free Lunch Application-English	Yes	School	3	
42	240-30A	Free Lunch Application-Spanish	Yes	School	3	
43		Action Taken-English	Yes	School	3	
44		Action Taken-Spanish	Yes	School	3	
45		Free and Reduced Price Meal Survey		School Lunch	3	
46	240-23 240-24 240-26 240-32 240-33	Orders to Vendors		School Lunch School Cafe.	NR	
47		Order Check-Off List		School Lunch School Cafe.	NR	
48		Payment for Transporting Food		Accounting School Cafe.	3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
Department: School Services (cont.)
Division: Supply Management

Index No. 2.4R

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	MCPS 235-2	Warehouse Requisition		Supply	UA	
2	MCPS 234-1	Warehouse Inventory Transaction		Supply	UA	
3	MCPS 234-2	Textbook Inventory Transaction		Supply	UA	
4	MCPS 234-3	Warehouse Catalog Transaction		Supply	NR	
5	MCPS 234-6	Backorder Cancellation		Supply	NR	
6	MCPS 234-7	Warehouse Purchase Order Listing		Supply	NR	
7	MCPS 234-9	Delivery Request		Supply	NR	
8	MCPS 234-10	Daily Delivery Schedule		Supply	NR	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
 Department: School Services (cont.)
 Division: Transportation

Index No. 2.4S

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	555-3	Discipline Report			1	
2	215-4	Violations			DE	
3		Bus Assignment Roster			1	
4		Staff Car Roster			1	
5		Daily Log – Correspondence			2	
6		Stop Location			3	
7		Summary Sheet			3	
8		Evaluation Log			1	
9		Record of Service Calls			2	
10	215-2	Record of Operation			3	
11		Personnel Card			DE	
12		Attendance Sheet			1	
13		Time Accounting Report Form			3	
14		Complaint Record			1	
15	215-1	Field Trip Ticket			3	
16		Field Trip Mileage and Hours			3	
17		Record of Field Trip Assignments			1	
18		Special Education Attendance Roster			1 Mo.	
19	555-4	Transportation Arrangement Notification			1	
20	555-5	Mark Twain Transportation Notification			1	
21		Record of Payment to Handicapped Pupils to Private Schools			3	

PART TWO

**A. RECORDS RETENTION SCHEDULE NUMBER 582
for Local Records**

Office: Associate Superintendent for Business and Financial Services (cont.)
Department: School Services (cont.)
Division: Transportation (cont.)

Index No. 2.4S

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
22	215-16	Certificate of Attendance Private Schools			3	
23	215-17	Application for Reimbursement of Transportation Costs			1	
24	285-2	Certificate of Health Examination			DE	
25		Physical Examination Form			DE	
26		Attendance Voucher — Driver Meeting			1 Mo.	
27		Motor Vehicle Administration Accident Report Form			5	
28	215-5	Vehicle Condition Report			Life of Bus	
29	230-7	Gasoline Withdrawal			3	
30	215-19	Daily Report Gasoline and Oil			3	
31	215-10	Motor Pool Trip Ticket			1	
32	215-4	Vehicle Repair Ticket			Life of Bus	
33	215-23	Monthly Inspection			Life of Bus	
34	215-20	Annual Inspection			Life of Bus	
35	215-15	Lubrication Chart			1	
36	215-22	Night Crew Report Sheet			1	
37		Preventive Maintenance Inspection Certificate			3	
38		Bus Acceptance Check Sheet			Life of Bus	
39		School Bus Inspection Form			Life of Bus	
40		Maintenance and Operation Record			Life of Bus	
41		Gasoline Pump Readings			3	