

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

1. Requesting Agency

WORCESTER COUNTY

2. Division or Bureau of Requesting Agency

SUPERVISOR OF ASSESSMENTS

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. ASSESSMENT BOOK

Size: 16" x 22" x 3"
Dates: 1896 - -
Quantity: 107 volumes (65.8)
File Arrangement: By district and alphabetical by name
Annual Accumulation: 6 cubic feet
Audit: Annual outside audit and State audit

The Assessment Books are final books of entry listing assessments on taxable property. They are arranged by district, giving the name and address of the owner, the assessment year, description of the property, and the amount of the assessment. Increases and decreases of assessments are recorded as well as transfers of real property. After 1948, a separate volume was added for Business Intangible Personal Property, and in 1956, one volume for Farm and Estate Intangible Personal Property.

RECOMMENDATION: RETAIN PERMANENTLY; TRANSFER TO THE HALL OF RECORDS ALL VOLUMES PRIOR TO 1931.

2. ASSESSMENT CARDS - REAL PROPERTY

Size: 3 1/2" x 12"
Dates: 1922 - -
Quantity: 40 card transfer cases, 16 card drawers (52)
File Arrangement: By district and alphabetical by name
Annual Accumulation: 1 1/2 cubic feet
Disposable Amount: 40 cubic feet
Audit: Annual outside audit

APPROVED
HALL OF RECORDS COMMISSION

May 21/58
Sup. J. Ames notes
decided to retain
all Assessment
Books
G.W.S.

7. Agency, Division or Bureau Representative

Joseph M. Harrison
Signature

President
Title

9-19-57
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.

10/10/57
Date

Mavis S. Radloff
Archivist

10-14-1957
Date

[Signature]
Secretary

REQUEST FOR RECORDS RETENTION (SCHEDULE
(Continuation Sheet)

SCHEDULE NO. C-92

PAGE NO. 2.

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.

The Real Property Assessment Card contains all data, which in the Assessor's opinion, affects the valuation of the property. This information includes the dimensions of the property, utilities and streets, mortgages, if any, and the purchase price. The card also shows the district number and location, the owner's name, lot number, land assessment computation, and the old and new assessments. In cases of transfers of ownership, the name of the grantee, the deed reference, and purchase price are shown. This file is always current; when property is reassessed or transferred a new card is prepared to replace the old one which is transferred to an inactive file.

RECOMMENDATION: RETAIN FOR SIX YEARS OR UNTIL TRANSFERRED TO THE INACTIVE FILE, WHICHEVER IS LATER, AND THEN DESTROY.

3. ASSESSMENT CARDS - FARMS AND ESTATES PERSONAL PROPERTY

Size: 3 1/2" x 12"
Dates: 1955 -
Quantity: 8 card drawers
File Arrangement: By district and alphabetical by name
Annual Accumulation: 1/4 cubic foot
Audit: Annual outside audit

These Assessment Cards are based on information derived from the intangible personal property tax returns for farms and estates, showing the district number, the name and address, a description of the intangible property and the total State and County assessment. The tax return, prepared annually by the individual taxpayer, is attached to the assessment card and filed. The cards provide space for five levy years.

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

4. ASSESSMENT CARD - BUSINESS PERSONAL PROPERTY CARD

Size: 3 1/2" x 12"
Dates: 1954 -
Quantity: 22 card drawers
File Arrangement: Alphabetical
Annual Accumulation: 1/2 cubic foot
Audit: Annual outside audit

The Assessment Card for intangible personal business property shows the name and address of the owner, the district number, the type of business, and the assessment on securities, furniture, fixtures and merchandise, with the apportioned share of County and State taxes. The tax returns, prepared annually by each business firm, is attached to the card and filed. The cards provide space for five levy years.

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

APPROVED
HALL OF RECORDS COMMISSION

APPROVED BY
BOARD OF PUBLIC WORKS

OCT 14 1957

SECRETARY

REQUEST FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)

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.
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5. GENERAL CORRESPONDENCE

Size: 11" x 8½"
Dates: 1954 - -
Quantity: 2 file drawers
File Arrangement: By subject

This file contains correspondence regarding assessments, transfers, and related matters, with individuals, the State Tax Commission, and the Board of County Commissioners.

RECOMMENDATION: RETAIN FOR FIVE YEARS AND THEN DESTROY.

APPROVED BY
BOARD OF PUBLIC WORKS
OCT 14 1957
[Signature]
SECRETARY