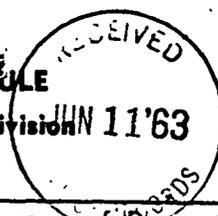


**REQUEST FOR RECORDS RETENTION SCHEDULE**  
To be Submitted to the Records Management Division  
Hall of Records Commission



SCHEDULE NO. C-241  
PAGE NO. 1

1. Requesting Agency: **MONTGOMERY COUNTY**  
2. Division or Bureau of Requesting Agency: **County Personnel Board - Administration and Training Section**

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 | 6. Recommendation of Hall of Records and Board of Public Works.

**1 MINUTES OF THE PROCEEDINGS OF THE COUNTY PERSONNEL BOARD**

Size: 8½" x 11"  
Dates: 1950 ---  
Quantity: 13 binders (copies in General Files)  
File Arrangement: Chronological

The Minutes of the Proceedings of the County Personnel Board contain a summary of transactions in matters pertaining to all phases of the recruitment, examination, employment, training and retirement of county personnel, including the administration of the County Personnel Board office. Extra copies of the minutes are considered to be 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.

RECOMMENDATION: RETAIN ORIGINAL MINUTES PERMANENTLY.

**2 PERSONNEL FILE**

Size: Letter size  
Dates: 1947 ---  
Quantity: 51 file drawers; 9 record center boxes (Resignations)  
File Arrangement: Alphabetical by name of employee

When an applicant is employed, his folder, including all material, is moved from the Application Files (Schedule C-242, Item 1) to the Personnel File, where other papers are added during the term of his employment. The Personnel folders contain all or some of the following papers:-

- Employment Application
- Employment Application Amendments
- Statement of Military Service
- Medical History Records

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7. Agency, Division or Bureau Representative

*John P. Gagnier* Personnel Assistant to County Manager June 11, 1963  
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.

*June 12, 1963* *Morris S. Redell* | *Cedric H. ...*  
Date Archivist | Date Secretary

**REQUEST FOR RECORDS RETENTION SCHEDULE**  
(Continuation Sheet)

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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<p>Baptismal and Birth Certificates Recommendation Job Announcements Notice to Appear for Examination Examination Answer Sheets and Tests Oral Interview Sheets Qualification Questionnaires Qualification Summary Authorization to Release Information Confidential Inquiries Armed Forces Discharge Copies Transcripts of Educational Records</p>	<p>Medical Examination Reports Physical Agility Test Results Report of Separation Photograph Fingerprint Identification Cards Application Disposition Report Appointment Checklists Eligible Lists Work Assignments Minutes, Resolutions, and Transcripts of Hearings:- County Council Personnel Board</p>
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The majority of county employees participate in the State of Maryland Employees' Retirement System. However, the Police Retirement Plan and special retirement plans maintained by the county for a few employees require that Personnel Files for these employees be retained until retirement payments have been discontinued. (Recommendation A.)

**RECOMMENDATION:** A) RETAIN PERSONNEL FILES FOR EMPLOYEES RETIRED UNDER COUNTY AND POLICE RETIREMENT PLANS FOR THREE YEARS AFTER LAST PAYMENT TO THE EMPLOYEE OR BENEFICIARY, THEN DESTROY.

B) RETAIN ALL OTHER PERSONNEL FILES, INCLUDING THOSE FOR EMPLOYEES RETIRED UNDER THE STATE EMPLOYEES' RETIREMENT SYSTEM, FOR ONE YEAR AFTER RETIREMENT, RESIGNATION OR TERMINATION OF SERVICE, THEN RETIRE TO THE COUNTY RECORD CENTER FOR FIVE ADDITIONAL YEARS, AND THEN DESTROY.

**3 LEAVE AND ATTENDANCE JOURNALS**

Size: 11" x 14½" sheets  
Dates: 1957 ---  
Quantity: 20 post binders  
File Arrangement: Chronological

This record series is composed of two types of journals which are prepared monthly from the IBM leave cards (Item 4).

The first journal series is the Master Leave Journal, internally arranged by department, then alphabetically by name of the employee, listing accumulations, charges and balances of all classes of leave.

The second series is the Monthly Leave Usage Totals Journal, arranged first by type of leave, then by department, with employees listed alphabetically under each department. This journal shows individual daily charges and totals by department and by type of leave.

The information contained in both journal series is closely related but the difference in presentation is of use to the office in preparing leave and attendance reports and studies for the use of the Personnel Board.

**RECOMMENDATION:** RETAIN FOR TEN YEARS, THEN DESTROY.

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REQUEST FOR RECORDS RETENTION SCHEDULE  
(Continuation Sheet)

SCHEDULE  
NO. C-241  
PAGE  
NO. 3

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.
4	<p><b>LEAVE AND ATTENDANCE CARDS</b></p> <p>Size: IBM cards Dates: 1957 --- Quantity: 27 IBM card drawers File Arrangement: Alphabetically by name of employee</p> <p>The Leave and Attendance Cards are prepared monthly by a personnel clerk in each county agency, with hand-entered data on leave and attendance for each employee. The cards are forwarded to the IBM Room in the County Building, where they are punched and the Leave and Attendance Journal (Item 3) run as a tab sheet. Both the card and the tab sheet are sent to the Personnel Board. Each card gives the name of the employee, the employee and departmental numbers, the amount of leave taken and the type of leave, the dates, the amount of leave earned, and the type of earned leave. These cards are considered to be 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.</p>	
5	<p><b>LIST OF PERSONNEL</b></p> <p>Size: 11" x 14½" sheets Dates: 1959 --- Quantity: 2 post binders File Arrangement: Chronological</p> <p>The IBM Room annually prepares a list of personnel at the time the W-2 Forms are prepared for the Department of Finance. The list is arranged alphabetically by name of employee, giving the employee number, the retirement and Social Security numbers, and the rate of pay. The list is used by the Personnel Board as a cross check on the Personnel File (Item 2) and the Leave and Attendance Cards (Item 4).</p> <p><b>RECOMMENDATION:</b> RETAIN IN OFFICE FOR ONE YEAR, TRANSFER TO RECORD CENTER FOR AN ADDITIONAL FIVE YEARS, THEN DESTROY.</p>	
6	<p><b>GENERAL PERSONNEL FILE</b></p> <p>Size: Letter size Dates: 1949 --- Quantity: 7 file drawers; 1 transfile File Arrangement: By subject</p> <p>The General Personnel Files contain original records, as well as printed and mimeographed material arranged by subject. Letters A and B following each entry refer to the recommendations A and B below. However, material governed by Recommendation B and having continuing legal or administrative value to the office should be retained until</p>	

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REQUEST FOR RECORDS RETENTION SCHEDULE  
(Continuation Sheet)

SCHEDULE  
NO. C-241  
PAGE  
NO. 4

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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such value ceases. Subjects in these files are as follows:-

- Adjusted Pay Schedules (B)
- Annual Reports of the County Personnel Board (A)
- Associations and Societies (B)
- Civil Defense (B)
- Commission on Human Relations (B)
- County Council Resolutions (A):
  - Personnel Resolutions, Memoranda, and Recommendations for Appointment presented to the County Council by the County Personnel Board
- County Personnel Board Agenda and Minutes (A)
- Daily Absence Reports (discontinued) (B)
- Department Pay Schedules (B)
- Employee Master Leave Record (B)
- General Correspondence (B)
- Information Reports for IBM Room (B)
- Military Service Status (employees) (B)
- Miscellaneous printed and mimeographed reports and studies (non-record)
- Overtime Reports (B)
- Pay Raise Studies and Reports (B)
- Personnel Bulletins (nonrecord)
- Personnel Programs (B)
- Police Promotion Eligible Lists (B)

All mimeographed and printed material found in this file is considered to be nonrecord within the meaning of the statute and may be destroyed as soon as no longer needed by the office. (Ann. Code of Maryland, 1957 Edition as amended, Art. 41, Sec. 179).

- RECOMMENDATION: A. RETAIN PERMANENTLY.  
B. RETAIN FOR THREE YEARS, THEN DESTROY.

7 GENERAL FILE

Size: Letter size  
Dates: 1960 ---  
Quantity: 5 file drawers  
File Arrangement: By subject

The General File includes material on the county training programs, as well as on administration and special project studies. The more important entries are:

- Administration
- Budget Papers
- County Personnel Board Agenda and Minutes (copies)
- Training Programs - Jail Guards
- Police Professional Advancement Training Program
- Telephone Courtesy

Printed and mimeographed material is considered nonrecord within the meaning of the statute (Ann. Code of Maryland, 1957 Edition, as amended, Art. 41, Sec. 179) and may be destroyed as soon as no longer

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**REQUEST FOR RECORDS RETENTION SCHEDULE**  
(Continuation Sheet)

SCHEDULE  
NO. C-247  
PAGE  
NO. 5

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.

Item  
No.

needed by the office. Material having continuing legal or administrative value to the operation of the office should be retained until such value ceases.

RECOMMENDATION: RETAIN FOR THREE YEARS, THEN DESTROY.

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