

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
RECORDS RETENTION AND DISPOSAL SCHEDULE**

Schedule No. C-12358
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Agency- **Montgomery County Government (MCG)
General Schedule** Division/Unit
Administrative Record Series

Item No.	Description	Retention
1-1	<p align="center">Schedule supersedes schedule number C1138</p> <p>The term Administrative Record Series is intended to cover a wide variety of records created in the normal course of business. The series may include:</p> <p>General</p> <ul style="list-style-type: none"> ○ Correspondence ○ Call Logs ○ Calendars- Records kept to document and facilitate the routine planning and scheduling of meetings, appointments, daily tasks, or similar activities. ○ Internal meeting minutes, attendance, agendas 	<p>Screen every three years and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, legal, or historical value. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>
1-2	Policy and Procedures	<p>Permanent. Screen records every 10 years and transfer superseded versions to Maryland State Archives for permanent retention. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>

Schedule Approved by Department, Agency, or Division Representative.
Date October 10, 2013
Signature *Edward Buchanan*
Typed Name Edward Buchanan
Title Government Records & Imaging Coordinator

Schedule Authorized by State Archivist
Date 1-30-14
Signature *Tim Bahr*

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
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Agency Montgomery County Government
General Schedule

Division/Unit
Administrative Record Series

Item No.	Description	Retention
1-3	Official County Correspondence- Correspondence created by the Executive, Director or their designee.	Permanent. Retain record on-site 10 years then transfer to Maryland State Archives for permanent retention. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
1-4	Program Creation <ul style="list-style-type: none"> ○ Design ○ Development ○ Implementation 	Screen every three years and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, legal, or historical value. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
1-5	Budget <ul style="list-style-type: none"> ○ Approved- Records documenting the final annual financial plan approved by the County. May include budget message, financial summaries, revenues and expenditures, operating programs, position and wage analysis, overhead allocations, organizational charts, previous actual or budgeted amounts, and related data. 	Permanent. Retain records 5 years from approval date, then transfer to Maryland State Archives for permanent retention. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Agency Montgomery County Government General Schedule		Division/Unit Administrative Record Series
Item No.	Description	Retention
1-6	Budget <ul style="list-style-type: none"> ○ Reports ○ Recommendations ○ Changes 	Screen records every 5 years and destroy all material not needed for the conduct of business. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
1-7	Performance Measures, Statistics	Screen records every 5 years and destroy all material not needed for conduct of business. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
1-8	Administrative Reports	Screen records every 5 years and destroy all material not needed for conduct of business. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
1-9	Annual Reports	Permanent. Retain records on-site 10 years then transfer to Maryland State Archives for permanent retention. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Item No.	Description	Retention
1-10	Hiring Management	Screen records every 5 years and destroy all material not needed for conduct of business. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
1-11	Training- These records consist of materials used in training, such as films, compact disks, electronic files, slides, commentaries, manuals, workbooks and other related data.	Screen every 5 years and destroy all material that is obsolete, superseded or the administrative need is met. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
1-12	Legislative and Regulation Working Files- These records consist of copies of bills/regulations, proposed legislation, review letter, fiscal notes, departmental analysis, public comments, mailing lists, attorney notes and impact statements.	Screen every 10 years and destroy all material that is obsolete, superseded or the administrative need is met. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Item No.	Description	Retention
1-13	External Publications: Any informational material developed by or for an agency for general public dissemination.	Permanent. Retain for 5 years, then transfer to the Maryland State Archives. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
1-14	Internal Publications: Pamphlets, leaflets, flyers, or other information material printed by the County or any of its departments and distributed internally.	Screen every three years and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, legal, or historical value.

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Agency **Montgomery County Government** **Division/Unit**
 General Schedule **Board and Commission Record Series**

Item No.	Description	Retention
2-1	Archival Administrative records may include, but are not limited to: <ul style="list-style-type: none"> ○ Minutes ○ Agendas ○ Annual Reports ○ Formation and Organizational history 	Permanent. Transfer to State Archives every 10 years for permanent retention. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
2-2	Administrative records may include, but are not limited to: <ul style="list-style-type: none"> ○ Attendance reports ○ Testimony ○ Legislation ○ Membership lists ○ Appointment papers ○ General volunteer forms ○ Correspondence ○ Various other Miscellaneous documents 	Screen annually and destroy material that is no longer needed for current business.
2-3	Financial records are the same as noted in the General Financial Records Series, Schedule Item 6-1, but are related to a Board or Commission.	Retain for 7 years or until all audit requirements have been fulfilled, whichever is later, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be maintained by the above retention statement and the original paper version must be destroyed.

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General Schedule**

Division/Unit
Compliance Record Series

Item No.	Description	Retention
3-1	HIPAA Guidelines, Policies and Procedures	Federal law at 45 CFR164.530 states retention is 6 years from the date of creation or 6 years from date when document is last in effect, whichever is later, and then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
3-2	Employee HIPAA Compliance Training Records	Federal law at 45 CFR164.530 states retention is 6 years from the date of creation or 6 years from date when document is last in effect, whichever is later, and then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
3-3	HIPAA Incidents- Confidential compliance records that include some client identifying information, employee information, investigatory, and other sensitive information. Client requests related to their information, client complaints related to requests or related to how their information was used or disclosed. Reports of suspected violations of policy or law. Reports of suspected breaches. Investigations related to complaints or reported violations or breaches. Risk assessments. Breach notification letters and other mandatory notification. Recommendation for sanctions.	Federal law at 45 CFR164.530 states retention is 6 years from the date of creation or 6 years from date when document is last in effect, whichever is later, and then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Item No.	Description	Retention
3-4	ADA Compliance: Complaints/Grievances- Records required to be retained under Age Discrimination in Employment Act (ADEA) and Americans with Disabilities Act (ADA) containing results of physical examinations considered in connection with personnel actions. Note: These records are not personnel records and must be kept physically separate from employee personnel records in a separate location as required by the Americans with Disabilities Act.	Retain 4 years after resolution of case, and then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Division/Unit
Contract Record Series

Item No.	Description	Retention
4-1	Departmental Contract Records contain agreements and contracts of various kinds that document some form of agreement that is enforceable by law between Montgomery County and other parties, including but not limited to: <ol style="list-style-type: none"> 1. Contract Monitoring Reports 2. Contract Action Worksheets 3. Contract Personnel Records 4. Contract Renewal Documents 5. Correspondence 6. Insurance Certificates 7. Invoices and supporting documentation 8. Monthly/Quarterly/Annual Reports 9. Notice to Proceed 10. Purchase Orders 11. Memorandum of Understanding 12. Bond Verification, Special Conditions, Amendments 13. Various other Miscellaneous documents 	Retain 5 years from expiration of contract or until all audit requirements have been met, whichever is later, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
4-2	Request for Proposal (RFP) Solicitations	Retain 5 years from expiration of contract or until all audit requirements have been met, whichever is later, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Division/Unit
Contract Record Series

Item No.	Description	Retention
4-3	Construction/Architectural and Engineering Request for Proposals (RFPs)- These are the Office of Procurement's Operations Section Request for Proposal Solicitation documents for construction & architectural/engineering projects from unsuccessful proposers and may also include copies of the Request for Proposal (RFP) solicitation and RFP amendments.	Retain in office until no longer needed for current County business, then transfer to the Montgomery County Records Center for 20 years, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
4-4	Non-Construction/Non-Architectural and Engineering Contracts - These are the Office of Procurement's Non-Construction and Non-Architectural and Engineering Contracts that may include: <ol style="list-style-type: none"> 1. Amendments 2. Award Sheets/Modification Forms 3. Bonds 4. Contract 5. Change Order 6. Contract Modification 7. Contract Review Committee (CRC) documents 8. General Correspondence 9. General Information 10. Maryland Public Information Act (MPIA) documents 11. Minority, Female, Disabled Person, Compliance documents 12. Purchase Orders/Change Orders to PO 13. RFP Solicitation from successful offeror 14. Requisitions 	Retain in office until expiration date or until all audit requirements have been met, whichever is later, then transfer to the Montgomery County Records Center for 5 years, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Division/Unit
Contract Record Series

Item No.	Description	Retention
4-5	<p>Construction /Architectural and Engineering Contracts- These are the Office of Procurement's Construction/Architectural and Engineering Contracts that may include:</p> <ol style="list-style-type: none"> 1. Amendments 2. Award Sheets/Modification Forms 3. Bonds 4. Contract 5. Change Order 6. Contract Modification 7. Contract Review Committee (CRC) documents 8. General Correspondence 9. General Information 10. Maryland Public Information Act (MPIA) documents 11. Minority, Female, Disabled Person, Compliance documents 12. Purchase Orders/Change Orders to PO 13. RFP Solicitation from successful offeror 14. Requisitions 	<p>Retain in office until expiration date or until all audit requirements have been met, whichever is later, then transfer to the Montgomery County Records Center for 20 years, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>
4-6	<p>Construction/Architectural and Engineering Administrative Contract Records- These are other Office of Procurement records relating to Construction and Architectural & Engineering Contracts and may include:</p> <ol style="list-style-type: none"> 1. Contract Disputes; 2. Open Solicitations; 3. Protests; 4. Requests for Expression of Interest (REOI); 	<p>Retain in office until no longer needed for current County business, then transfer to the Montgomery County Records Center for 20 years, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>

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Division/Unit
Facility Record Series

Item No.	Description	Retention
5-1	Site Plans- final approved plans of buildings for which permits have been issued.	Retain 7 years after facility is vacated by Montgomery County Government, and then destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archives for permanent retention any material that has continuing administrative, fiscal, legal, or historical value. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
5-2	Work Request Processing- tracking all facilities work requested including building maintenance, electrical, plumbing, landscaped, cleaning, trash removal, HVAC, Renovations, Telephone, Data, Moving Services	Retain 7 years after facility is vacated by Montgomery County Government, and then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Agency	Montgomery County Government General Schedule	Division/Unit Facility Record Series
Item No.	Description	Retention
5-3	Equipment/furniture manuals	Retain 7 years after equipment/ furniture no longer in use, and then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
5-4	Disaster and Emergency Management Plans- Records concerning preparedness, evacuations, and operations in the event of a disaster (natural, accidental, or malicious). Includes but not limited to official copy of comprehensive plan and all background surveys, studies, reports, and draft versions of plans.	Continuous record. Maintain as a perpetual file by updating when amended. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Division/Unit
Facility Record Series

Item No.	Description	Retention
5-5	Inspection Reports - Records concerning the maintenance, repair and inspection of municipal owned facilities. Including plumbing, electrical, fire and other systems.	Retain 7 years after facility is vacated by Montgomery County Government, and then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
5-6	Certificates of Occupancy - Documents issued by the municipality after the permitted construction activity is completed as evidence that all minimum requirements have been met before the building or structure can be occupied and used.	Retain until building is no longer standing then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Division/Unit
Financial Record Series

Item No.	Description	Retention
6-1	<p>The Financial Record Series is intended to cover a wide variety of documentation related to Financial transactions and may include:</p> <ol style="list-style-type: none"> 1. Direct Vouchers and supporting documentation. 2. Purchase Orders- These are forms authorizing the order to purchase supplies or equipment by the county. They contain the name of requesting agency, name of vendor, item, date ordered, delivery date, purchase order number, account charging, and authorized signature. 3. Reimbursement Requests 4. P-card records retained by county departments include all transactional backup and receipts and the statement of account by cycle. 5. Financial Reports 6. Fee Collection 7. Bank Statements 8. Cancelled Checks 9. Bank Reconciliation Includes spreadsheets, book balance reports used for reconciliation of all bank accounts. 10. Utility Records- Gas, Water and Electric invoices, tracking and conservation efforts. 11. Various other Miscellaneous Financial documents 	<p>Retain for 7 years or until all audit requirements have been fulfilled, whichever is later, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>
6-2	<p>Federal Grant Records- Financial records, supporting documentation, financial reports, drawdowns, communications between grant accountants, departmental grant managers and contacts in granting agencies for grants funded directly by the Federal government.</p>	<p>Retain 3 years after submission of last financial report, ending of litigations or audit, or for real property after final disposition, whichever is latest, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>

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Item No.	Description	Retention
6-3	State Grant Records- Financial records, supporting documentation, financial reports, drawdowns, communications between grant accountants, departmental grant managers and contacts in granting agencies for grants funded with State money or with Federal dollars through the State.	Retain 7 years after submission of last financial report, or ending of litigations or audit, or after final disposition when concerning real property, whichever is latest, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
6-4	Employee Timecards- Records of all County employees time for payroll use.	Retain 10 years from pay period end date, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
6-5	Bond Records- Debt Management Transcripts and General Obligation Bond Transcripts	Retain 3 years from maturation of bond, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Division/Unit
IT Systems Record Series

Item No.	Description	Retention
7-1	<p>The IT Systems Record Series is intended to cover a wide variety of documentation related to Information Technology Systems and may include:</p> <p>System Documentation- System definitions, flowcharts, hardware/software infrastructure, program descriptions and documentation, work flow records, system specifications, etc</p>	<p>Destroy 1 year after system is superseded or obsolete. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>
7-2	<p>Quality Assurance Records – Information verifying the quality of system, hardware or software operation including records of errors or failure and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records need as an audit trail to evaluate data accuracy.</p>	<p>Screen annually and destroy records which no longer have administrative value. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>
7-3	<p>Systems Application Development Documentation – Program code, program flowcharts, user guides, program maintenance log, system change notice, and other records that documents modifications to computer programs.</p>	<p>Destroy 1 year after system is superseded or obsolete. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>

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Division/Unit
IT Systems Record Series

Item No.	Description	Retention
7-4	Systems Security - Internet and service logs	Destroy in office after 5 years or when administrative value ends, whichever is later. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
7-5	Systems Security - Computer Security Incidents	Screen annually and destroy records which no longer have administrative value. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
7-6	Systems Security - Disaster Preparedness and Recovery- Records related to the protection and re-establishment of data processing of services and equipment in case of a disaster.	Destroy 1 year after system is superseded or obsolete. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
7-7	Various other Miscellaneous Technology documents	Destroy in office after 1 year or when administrative value ends, whichever is later. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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**Division/Unit
Personnel Record Series**

Item No.	Description	Retention
8-1	<p>Official Personnel Record- The Office of Human Resources (OHR) must keep the County's official personnel file for each employee. The official personnel file must not contain any information about an employee's medical or psychological condition. OHR must limit the documents in the official personnel file to:</p> <ul style="list-style-type: none"> ○ application that resulted in appointment, reappointment, promotion, transfer, or demotion; ○ employment history, including personnel action documents affecting appointment, reappointment, promotion, transfer, demotion, salary change, or other personnel action; ○ employee identifying information and emergency contact information; ○ payroll withholding documents; ○ insurance, retirement, and other records related to employee benefits; ○ documents submitted by the employee with the employee's application for employment or promotion to show that the employee has a degree, license, or certificate required for the current job or desired job, but not routine training records, such as verification of a class or conference attended; ○ disciplinary actions other than written reprimands; ○ commendations. 	<p>Retain 100 years after separation date, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>
8-2	Performance evaluations	<p>Retain 5 years, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>

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Division/Unit
Personnel Record Series

Item No.	Description	Retention
8-3	Written reprimands	Retain 1 year, then destroy. If employee is a member of a recognized bargaining unit, those regulations supersede Montgomery County regulations. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.
8-4	<p>Employee Medical Records- The Manager of Occupational Medical Services is the custodian of employee medical records and must maintain the medical record of each employee. The Manager of Occupational Medical Services must limit the medical record of an employee to:</p> <ul style="list-style-type: none"> a. County medical examination records; b. records obtained or received from a health care provider about the fitness of an employee or applicant or a request for disability retirement; c. a medical waiver or release signed by the employee; d. a request by the employee's supervisor or department director for an additional or special medical examination and the record of an action taken in response to the request; e. result of a medical test, examination, or procedure including psychological examination or report; and f. information provided by the employee or other person that relates to the health or health care of the employee. <p>An employee's psychological or genetic records:</p> <ul style="list-style-type: none"> a. are subject to special restrictions on disclosure; and b. must be maintained in the employee's medical record. <p>Medical records are confidential. The Manager of Occupational Medical Services must maintain medical records in a secure location apart from other employee records.</p>	Retain paper records until scanned to Maryland State Archives' standards, then destroy. Retain 100 years after separation date, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.

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Personnel Record Series

Item No.	Description	Retention
8-5	<p>Departmental Personnel Records - These are the departments employee files for county employees and may contain:</p> <ul style="list-style-type: none"> ○ an employee's home address and phone number ○ current job information, which may include the job description and location ○ employee emergency contact information ○ training records ○ timesheet and leave data necessary to verify payroll ○ various other Miscellaneous personnel documents ○ disciplinary actions 	<p>Retain 5 years after separation date, then destroy. If employee is a member of a recognized bargaining unit, those regulations supersede Montgomery County regulations. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>
8-6	<ul style="list-style-type: none"> ○ leave records ○ performance evaluations and supporting documentation ○ commendations ○ notices received from the Employee Medical Examiner concerning the employee's duty status, work restrictions, and recommended accommodations 	<p>Retain 5 years, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.</p>

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
RECORDS RETENTION AND DISPOSAL SCHEDULE
(Continuation Sheet)**

Schedule No. *C-1234*

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Agency		Montgomery County Government General Schedule	Division/Unit	Personnel Record Series
Item No.	Description		Retention	
8-7	<ul style="list-style-type: none"> ○ notes from health care providers submitted by employees during the last two years to confirm medical appointments, excuses from work, duty status, returns to work, and work restrictions 		Retain 2 years, then destroy. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.	
8-8	Supervisory Personnel Records - The supervisor may include in the supervisory file: <ul style="list-style-type: none"> ○ copies of records contained in the department operating record ○ commendations and complaints from customers concerning the employee's job performance or conduct ○ notes made by the supervisor during a performance review or other counseling sessions with the employee ○ copies of the employee's completed work assignments, draft documents, or work in progress ○ written communications between the employee and the supervisor concerning performance or conduct issues 		Non-permanent. Retain HIPAA documents for 6 years, then destroy. For all other material for bargaining agreement and employees, screen annually and destroy material no longer needed for current business. For all other material for unrepresented employees, screen every two years and destroy material no longer needed for current business. This record, if paper, may be scanned to Maryland State Archives' standards and have that image become the official record. The image must be managed by the above retention statement and the original paper version must be destroyed.	