

OFFICE OF CENTRAL SERVICES

Records Management Division

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2

RECORDS RETENTION AND DISPOSAL SCHEDULE

AGENCY: Office of Budget DIVISION:					
Item No.	Description		Retention		
	SUPERSEDES SCHEDULE C-1	003			
1	BUDGET BOOKS – CAPITAL & OPERATIN PROPOSED & FINAL	īG ·	Retain 5 years, then transfer to MD State Archive for permanent retention		
2	BUDGET CYCLE SHEETS Work papers that include five (5) different bucycles, Current Year Status through Council	Retain for 3 years, then destroy			
3	MANAGEMENT / REVENUE STUDIES Includes analysis of management practices & intake in various departments and projects. studies have considerable reference value.	Retain for 5 years, then transfer to MD State Archive for permanent retention			
		,			
Schedule Approved by Agency on Division Representative 6 / 14 / 16 Date Signature		Schedule Approved by Chief Administrative (
	roved by Records Management Officer		01		
		Date Schedule Approved by	Signature		
Date	The state of the s	State Archivist			
	Form and Legal Sufficiency				
Aune Arundel	County, Maryland Office of Law	6.28.16	TuBar		
Date	Signature	Date	Signature		



OFFICE OF CENTRAL SERVICES

Schedule No.

2

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Records Management Division

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of

2

RECORDS RETENTION AND DISPOSAL SCHEDULE (Continuation Sheet)

AGENCY	DIVISION:	DIVISION:					
Item No.	Description	Retention					
4	GENERAL CORRESPONDENCE General correspondence, including emails, letters, housekeeping records, published & reproduced materials, administrative, departmental & special reports. Current working papers and other collected information and data of a non-record kind.	Retain 5 years, then destroy					
5	PENSION DOCUMENTATION Includes general correspondence, copies of Capital Call & Distribution Disbursements, CAFR's (Comprehensive Annual Financial Report) and actuarial reports.	Retain 5 years, then destroy					

Instructions –Type or Print a separate form for each new or revised record series. Forward with Records Retention Schedule (DGS 550-1)	RECORDS MANA 7275 Waterloo R Jessup, Ma	GENERAL SERVICES GEMENT DIVISION oad, P.O. Box 275 ryland 20794 99-1930	MENT DIVISION I, P.O. Box 275 PAGE1 OF5			
Department/Agency Anne Arundel County Budget Office	2. Division		3. Unit 1044			
DEFINITION: RECORD SERIES: A group of relate purposes.	d records normally filed	and used as a unit for	reference as well as retention and disposition			
Record Series Title Budget Books – Capital & Operating Proposed and	nd Final	5. Earliest Year/Latest Year 1969 to 2017				
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Departmental budgets - used for historical information						
7. Record Series Format(s) List all	8. Record Serie					
Letter Size Microfilm	Alphabetica	4.25 GE Number				
Legal Size Computer Tape	Numerical x Chronologica	☐ Micr	Drawer(s) ofilm Reel(s) sputer Tape(s)			
☐ Bound Book ☐ Video Tape	☐ Geographic	x Other				
x Other (specify) Electronically	Other (spe	10. Anni				
		Micr Com	Drawer(s) ofilm Ree(s) puter Tape(s) (specify) bytes			
11. File is Used		12. File Becomes Inactive	After			
☐ Dally ☐ Weekly ☐ Monthly x Annu	ially	Number Month(s) 1 Year(s)				
Current Location(s) (Bidg., Floor, Room) Anne Arundel County Server and the Anne Arundel County Intractional County Intraction County Intraction	a-net	14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.) Yes X No				
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s) Yes X No		16, Audit Requirements X None State Federal Independent				
17. Is an Index System used? If yes, explain briefly and describe requirements Yes X No		18. Recommended Retention Retain 5 years, then transfer to MD State Archive				
		for permanent reten	tion			
19. Name and Title of Preparer 20. Telepho Michele Kirby 410-222-12		one Number 21. Da 222 June 2	nte 14, 2016			

Instructions –Type or Print a separate form for each new or revised record series. Forward with Records Retention Schedule (DGS 550-1)	Jessup, Mai				
Department/Agency Anne Arundel County Budget Office	2. Division		3. Unit 1044		
DEFINITION: RECORD SERIES: A group of relate purposes.	ed records normally filed	and used as a unit	for reference as well as retention and disposition		
4. Record Series Title Budget Cycle Sheets			5. Earliest Year/Latest Year 2003 to 2017		
 Record Series Description (Briefly describe the series.) Work papers that include five (5) different budge Used for historical information. 			d in the series. Include the purpose or function of the incil Approved.		
7. Record Series Format(s) List all Letter Size Microfilm	8. Record Serie	4 G	/olume SB mber		
Legal Size Computer Tape Audio Tape Floppy Disk Bound Book Video Tape	☐ Numerical x Chronologica	al	File Drawer(s) Microfilm Reel(s) Computer Tape(s) her (specify) bytes		
x Other (specify) Electronically	Other (spec	10. 900 Nur	Annual Accumulation O mb mber File Drawer(s) Microfilm Reel(s) Computer Tape(s) Other (specify) bytes		
11. File is Used Dally Weeldy Monthly x Annually		12. File Becomes Inactive After Number			
13. Current Location(s) (Bidg., Floor, Room) Anne Arundei County Server		14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.) ☐ Yes x No			
Arundel Center 15. Access Restrictions (If Yes, cite Law(s) & Regulation(s) Yes X No		16. Audit Requirements X None State Federal independent			
17. Is an Index System used? If yes, explain briefly and describe requirements ☐ Yes X No		18. Recommended Retention Retain for 3 years, then destroy			
19. Name and Title of Preparer 20. Telepho Michele Kirby 410-222-12			. Date ine 14, 2016		

Instructions –Type or Print a separate form for each new or revised record series. Forward with Records Retention Schedule (DGS 550-1)	DEPARTMENT OF GENERAL SE RECORDS MANAGEMENT DIN 7275 Waterloo Road, P.O. Box Jessup, Maryland 20794 410-799-1930		ISION	PAGE3 OF5		
Department/Agency Anne Arundel County Budget Office			3. Unit 1044			
DEFINITION: RECORD SERIES: A group of relate purposes.	ed records normally filed	and used as a	unit for re	ference as well as retention and disposition		
Record Series Title Management / Revenue Studies	5. Earliest Year/Latest Year 1980 to 2017					
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Includes analysis of management practices & revenue intake in various departments and projects. These studies Have considerable reference value Used for historical information						
7. Record Series Format(s) List all	8. Record Ser		9. Volume 4 GB			
X Letter Size Microfilm	Alphabetic	al	Number	nber		
Legal Size Computer Tape	Numerical		X File Drawer(s) Microfilm Reel(s)			
Audio Tape Floppy Disk	x Chronologic	al	Computer Tape(s) x Other (specify) Varies			
☐ Bound Book ☐ Video Tape	Geograph	ical				
x Other (specify) Electronically	Other (specify)		10. Annual Accumulation Veries Number X File Drawer(s) Microfilm Reel(s) Computer Tape(s) x Other (specify) Varies			
11. File is Used		12. File Becom	es Inactive Af	ter		
☐ Daily ☐ Weekly ☐ Monthly x Annu	Number					
Current Location(s) (Bldg., Floor, Room) Anne Arundel County Server & Anne Arundel County Budget O Arundel Center, Floor 4, Room 410	14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.) \[\sum \text{Yes} \text{X No} \]					
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s) ☐ Yes X No	16. Audit Requirements X None ☐ State ☐ Federal ☐ Independent					
17. Is an index System used? If yes, explain briefly and describe requirements ☐ Yes X No		18. Recommended Retention Retain for 5 years, then transfer to MD State Archives				
	for permane	eni retentio	л			
19. Name and Title of Preparer 20. Telepho Michele Kirby 410-222-123		one Number 222	21. Date June 14, 2016			

Instructions -Type or Print a separate form for each new or revised record series. Forward with Records Retention Schedule (DGS 550-1)	DEPARTMENT OF G RECORDS MANAC 7275 Waterloo Ro Jessup, Mar	GEMENT DIVISION ad, P.O. Box 275 yland 20794		PAGE4 OF5		
Department/Agency Anne Arundel County Budget Office				3. Unit 1044		
DEFINITION: RECORD SERIES: A group of relate purposes.	ed records normally filed	and used as a	unit for ref	erence as well as retention and disposition		
Record Series Title General Correspondence		5. Earliest Year/Latest Year2011 toPresent				
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) General correspondence, including emails, letters, housekeeping records, published & reproduced materials, Administrative, departmental & special reports. Current working papers and other collected Information and data of a non-record kind. Used for historical information						
7. Record Series Format(s) List all	8. Record Serie	s Sequence	9, Volume			
X Letter Size Microfilm	X Alphabetical	X Alphabetical - Number				
Legal Size Computer Tape Audio Tape Floppy Disk Bound Book Video Tape X Other (specify) Electronically	X Chronologica Geographic	eal	X File Drawer(s) Microfilm Reel(s) Computer Tape(s) X Other (specify) County Email (G-mail) 10. Annual Accumulation Varies Number X File Drawer(s) Microfilm Reel(s) Computer Tape(s) X Other (specify) Varies			
11. File is Used X Daily	12. File Becomes Inactive After Number					
Current Location(s) (Bidg., Floor, Room) Anne Arundel County Server – Anne Arundel County G-mail Arundel Center, Floor 4, Room 410	14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.) Yes X No					
15. Access Restrictions (if Yes, cite Law(s) & Regulation(s) ☐ Yes X No		16. Audit Requirements X None ☐ State ☐ Federal ☐ Independent				
17. Is an Index System used? If yes, explain briefly and describe requirements ☐ Yes X No		18. Recommended Retention Retain 5 years, then destroy				
19. Name and Title of Preparer 20. Telepho Michele Kirby 410-222-12		one Number	21. Date June 14,	2016		

Instructions –Type or Print a separate form for each new or revised record series. Forward with Records Retention Schedule (DGS 550-1)	RECORDS MANAG 7275 Waterloo Ro Jessup, Mar	GENERAL SERVICES GEMENT DIVISION pad, P.O. Box 275 ryland 20794		PAGE6 OF5		
Department/Agency	2. Division			3. Unit		
Anne Arundel County Budget Office		1044				
DEFINITION: RECORD SERIES: A group of related purposes.	d records normally filed	and used as a	unit for re	ference as well as retention and disposition		
4. Record Series Title		5. Earliest Year/Latest Year				
Pension Documents		toPresent				
Record Series Description (Briefly describe the series.) Includes general correspondence, copies of Cap Financial Reports) and actuarial reports.						
7. Record Series Formet(s) List all	8. Record Serie	os Canunno	Q. Volumo			
7. Record Series Format(s) List all	a, Nacord Serie	sa coddellen	9: Volume			
X Letter Size Microfilm	X Alphabetical		Number			
X Legal Size Computer Tape	Numerical	Numerical		X File Drawer(s)		
F	DO:			☐ Microfilm Reel(s) ☐ Computer Tape(s)		
Audio Tape Floppy Disk	Chronologic	Chronological Co				
X Bound Book Video Tape	Geographic	cal	10. Annual Accumulation			
x Other (specify) Electronically	Other (spec	(specify) Number				
			X File Draw Microfile Compu	n Reel(s) der Tape(s)		
11. File is Used		12. File Becomes	s Inactive Af	er		
☐ Daily X Weekly ☐ Monthly Annual	Number	_	ionth(s) 1 Year(s)			
13. Current Location(s) (Bidg., Floor, Room) Anne Arundel County Budget Office File Room - Anne Arundel Arundel Center, Floor 4, Room 410	14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.) Yes X No					
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s) Yes X No	16. Audit Requirements X None State Federal Independent					
17. Is an Index System used? If yes, explain briefly and describe ☐ Yes X No	18. Recommended Retention Retain 5 years, then destroy					
40 Name and Title of December	20 Tolent	one Number	21. Date	The state of the s		
19. Name and Title of Preparer 20. Telepho Michele Kirby 410-222-12			June 14			