

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

Schedule No. C1306

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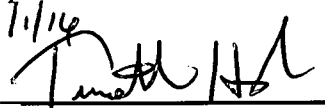
Agency
County Commissioners of Calvert County, MD

Division/Unit
Finance & Budget-Purchasing

Item No.	Description	Retention
1	<p>“The issuance of a legal hold by the County Attorney’s Office overrides any portion of this record retention policy or schedule that otherwise calls for the disposal, transfer, or destruction of records subject to the hold, until the hold has been released by the County Attorney’s Office. No record that is subject to a legal hold may be altered, disposed of, transferred, or destroyed, even if the scheduled destruction date has passed. Any person preparing to alter, dispose of, transfer, or destroy a record must ascertain whether a litigation hold applies to the record before doing so.”</p> <p>Vacant - Merged with related material.</p>	
2	Purchase Orders (purchasing department copy)	Retain 7 years, then destroy.
3	Fixed Asset Listing	
	a. Physical Inventories	Retain 1 year after audit, then destroy.
	b. Inventory Disposal Forms	Retain 3 years, then destroy.
	c. Fixed Asset Journal Postings	Retain 7 years, then destroy.

Schedule Approved by Department, Agency, or Division Representative.

Date 12/1/16

Signature 

Typed Name Timothy Hayden

Title Director, Finance and Budget

Schedule Authorized by State Archivist

Date 1.30.17

Signature 

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

Schedule No. C1306

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Agency County Commissioners of Calvert County, MD	Division/Unit Finance & Budget-Purchasing
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Item No.	Description	Retention
4	<p>Email</p> <p>Correspondence of personnel in the Finance & Budget-Purchasing Office.</p>	<p>Retain for 1 year and 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 served to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, legal or historical value.</p>
5	<p>Vacant-Series merged with related material</p>	

INSTRUCTIONS - TYPE OR PRINT A SEPARATE FORM FOR EACH NEW/REVISED ELECTRONIC RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1) COMAR 14.18.04.		DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD, P.O. BOX 275 JESSUP, MARYLAND 20794 (410) 799-1930.		ELECTRONIC RECORDS INVENTORY Page <u>1</u> of <u>5</u>	
1 DEPARTMENT/AGENCY County Commissioners of Calvert County, MD		2 DIVISION Finance & Budget		3 UNIT Purchasing	
DEFINITION - Record Series - A group of related records stored electronically and used as a unit for reference as well as retention and disposition purposes.					
4 ELECTRONIC RECORD SERIES TITLE Purchase Orders (purchasing department copy)				5 EARLIEST YEAR/LATEST YEAR 2006 TO Present	
6 INPUT - Identify source of information to be entered.			7 OUTPUT - Identify the use/s of information generated by system.		
8 ELECTRONIC RECORD SERIES DESCRIPTION - Briefly describe the information/documents/forms contained in a series. Include purpose and function of the system. Signed Purchase Orders and back-up information, if applicable, for all County Departments purchases.					
9 POLICY ON ACCESS AND USE - Explain or attach copy if established in writing. Documents can be obtained by Finance & Budget Purchasing through the County's purchase order database.					
10 UPDATING CYCLES OR CONDITIONS AND RULES FOR REVISING INFORMATION IN THE SYSTEM					
11 SPECIFY THE LOCATION AND MEDIA OF THE MAIN ELECTRONIC DATA FILE. Explain the progression established to ensure the record's retention and usability throughout the record's authorized life cycle. Purchase Orders are maintained on the County database and can be accessed at any time. The system is backed-up daily.					
12 RECOMMENDED RETENTION Retain 7 years, then destroy.					
13 TYPED OR PRINTED NAME OF PREPARER Roberta Baker		14 TELEPHONE NUMBER 410-535-1600 x2288		15 DATE 1/23/17	
16 TITLE OF PREPARER Purchasing Officer					
DGS 550-6					

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 SERVICES
RECORDS MANAGEMENT DIVISION
7275 Waterloo Road, P.O. Box 275
Jessup, Maryland 20794
410-799-1930

AGENCY RECORDS INVENTORY

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1. Department/Agency
County Commissioners of Calvert County, MD

2. Division
Finance & Budget

3. Unit
Purchasing

DEFINITION: RECORD SERIES: A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

4. Record Series Title
Fixed Asset Listing-a. Physical Inventories

5. Earliest Year/Latest Year
2006 to Present

6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.)

Individual Office Inventory documents for fixed assets.

7. Record Series Format(s) List all:

- Letter Size Microfilm
 Legal Size Computer Tape
 Audio Tape Floppy Disk
 Bound Book Video Tape
 Other (specify) _____

8. Record Series Sequence

- Alphabetical
 Numerical
 Chronological
 Geographical
 Other (specify) _____

9. Volume

Number _____

- File Drawer(s)
 Microfilm Reel(s)
 Computer Tape(s)
 Other (specify) _____

10. Annual Accumulation

Number _____

- File Drawer(s)
 Microfilm Reel(s)
 Computer Tape(s)
 Other (specify) _____

11. File is Used

- Daily Weekly Monthly Annually

12. File Becomes Inactive After

Number _____ Month(s) Year(s)

13. Current Location(s) (Bldg., Floor, Room)

County Services Plaza and County Storage Facility File Room

14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office)

- Yes No

15. Access Restrictions (If Yes, cite Law(s) & Regulation(s)

- Yes No

16. Audit Requirements

- None State Federal Independent

17. Is an Index System used? If yes, explain briefly and describe requirements.

- Yes No

18. Recommended Retention

Retain 1 year after audit, then destroy.

19. Name and Title of Preparer

Roberta Baker, Purchasing Officer

20. Telephone Number

410-535-1600 x2288

21. Date

1/23/17

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 SERVICES RECORDS MANAGEMENT DIVISION 7275 Waterloo Road, P.O. Box 275 Jessup, Maryland 20794 410-789-1930		AGENCY RECORDS INVENTORY PAGE <u>3</u> OF <u>5</u>	
1. Department/Agency County Commissioners of Calvert County, MD		2. Division Finance & Budget		3. Unit Purchasing	
DEFINITION: RECORD SERIES: A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.					
4. Record Series Title Fixed Asset Listing-b, Inventory Disposal Forms			5. Earliest Year/Latest Year 2006 to Present		
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Individual disposal inventory documents for fixed assets.					
7. Record Series Format(s) List all: <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Audio Tape <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Bound Book <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		8. Record Series Sequence <input type="checkbox"/> Alphabetical <input checked="" type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____		9. Volume _____ Number <input checked="" type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) _____	
11. File is Used <input checked="" type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly <input checked="" type="checkbox"/> Annually		12. File Becomes Inactive After Number _____ <input type="checkbox"/> Month(s) <input type="checkbox"/> Year(s)			
13. Current Location(s) (Bldg., Floor, Room) County Services Plaza and County Storage Facility File Room		14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s)) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent			
17. Is an Index System used? If yes, explain briefly and describe requirements. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		18. Recommended Retention Retain 3 year, then destroy.			
19. Name and Title of Preparer Roberta Baker, Purchasing Officer		20. Telephone Number 410-535-1600 x2288		21. Date 1/23/17	

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 SERVICES RECORDS MANAGEMENT DIVISION 7275 Waterloo Road, P.O. Box 275 Jessup, Maryland 20794 410-789-1850		AGENCY RECORDS INVENTORY PAGE <u>4</u> OF <u>5</u>	
1. Department/Agency County Commissioners of Calvert County, MD		2. Division Finance & Budget		3. Unit Purchasing	
DEFINITION: RECORD SERIES: A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.					
4. Record Series Title Fixed Asset Listing-c, Fixed Asset Journal Postings				5. Earliest Year/Latest Year 2006 to Present	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Individual fixed asset journal postings. Recording and tracking of assets in County's financial system.					
7. Record Series Format(s) List all: <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Audio Tape <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Bound Book <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		8. Record Series Sequence: <input type="checkbox"/> Alphabetical <input checked="" type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____		9. Volume Number: <u>1</u> <input checked="" type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) _____	
11. File is Used: <input checked="" type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly <input checked="" type="checkbox"/> Annually		12. File Becomes Inactive After: Number _____ <input type="checkbox"/> Month(s) <input type="checkbox"/> Year(s)			
13. Current Location(s) (Bldg, Floor, Room) County Services Plaza and County Storage Facility File Room		14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s)) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		16. Audit Requirements: <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent			
17. Is an Index System used? If yes, explain briefly and describe requirements. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		18. Recommended Retention Retain 7 years, then destroy.			
19. Name and Title of Preparer Roberta Baker, Purchasing Officer		20. Telephone Number: 410-535-1600 x2288		21. Date 1/23/17	

INSTRUCTIONS - TYPE OR PRINT A SEPARATE FORM FOR EACH NEW/REVISED ELECTRONIC RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1) COMAR 14.18.04		DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD, P.O. BOX 275 JESSUP, MARYLAND 20794 (410) 799-1930		ELECTRONIC RECORDS INVENTORY Page <u>5</u> of <u>5</u>	
1 DEPARTMENT/AGENCY County Commissioners of Calvert County, MD		2 DIVISION Finance & Budget		3 UNIT Purchasing	
DEFINITION - Record Series - A group of related records stored electronically and used as a unit for reference as well as retention and disposition purposes					
4 ELECTRONIC RECORD SERIES TITLE E-mail				5 EARLIEST YEAR/LATEST YEAR 2007 TO Present	
6 INPUT - Identify source of information to be entered e-mail of employees			7 OUTPUT - Identify the use/s of information generated by system Electronic mail		
8 ELECTRONIC RECORD SERIES DESCRIPTION - Briefly describe the information/documents/forms contained in a series. Include purpose and function of the system. Correspondence and non-records of personnel in the Finance & Budget-Purchasing Office.					
9 POLICY ON ACCESS AND USE - Explain or attach copy if established in writing. Only the owner of the e-mail account has access to the account.					
10 UPDATING CYCLES OR CONDITIONS AND RULES FOR REVISING INFORMATION IN THE SYSTEM					
11 SPECIFY THE LOCATION AND MEDIA OF THE MAIN ELECTRONIC DATA FILE. Explain the progression established to ensure the record's retention and usability throughout the record's authorized life cycle. County Government server					
12 RECOMMENDED RETENTION: Retain 1 year 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.					
13 TYPED OR PRINTED NAME OF PREPARER Roberta Baker		14 TELEPHONE NUMBER 410-535-1600 x2288		15 DATE 1/23/17	
16 TITLE OF PREPARER Purchasing Officer					
DGS 550-6					