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

Schedule No. M-64

Agency
Hagerstown

Division/Unit
Purchasing

Item No	Description	Retention
1	Insurance policies -contains but not limited to: various insurance policies covering vehicle, equipment, police department, fire, steam boilers	Retain for life of policy, plus three (3) years, then destroy
2	Material safety data sheets, technical data, correspondence	Retain until updated or superseded, then destroy
3	Bids, quotes, proposals -contains but not limited to: bid packages, insurance requirements, name and address, list of vendors receiving bid packages, tabulation sheet, brochures, correspondence	Retain for five (5) years and until all audit requirements have been fulfilled, then destroy.
4	Purchase orders -contains but not limited to: P.O.'s, sales order form, requisition, picking slip, packing slip	Retain for five (5) years and until all audit requirements have been fulfilled, then destroy.
5	Insurance - open/closed claims -contains but not limited to: open claims against the city, correspondence, check request, handwritten notes, court memorandum and order to dismiss	Retain for two (2) years after settlement of claim, then destroy.
6	Insurance claims against individuals -contains but not limited to: correspondence, repair worksheet, repair invoice, judgement in default entered, certificate of service, proof of claim, notice of order of recusal	Retain for two (2) years after settlement of claim, then destroy.

Approved by Department, Agency or Division Representative

Date 11-10-99

Signature GeorgiAnn R. Breichner

Type Name GeorgiAnn N. Breichner

Title City Clerk

Schedule Authorized by State Archivist

Date DEC 3 1999

Signature Edward C. Papenfuss

DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION **RECORDS RETENTION AND DISPOSAL SCHEDULE** (CONTINUATION SHEET)		**Schedule No.** M.64 **Page** 2 **of** 2
Item No	**Description**	**Retention**
7	Insurance Policies – dealing with Environmental issues have a permanent liability clause. This is per Dept. of the Environment.	Permanent, transfer periodically to the Maryland State Archives.

INSTRUCTIONS -- TYPE OR PRINT A SEPARATE FORM FOR EACH NEW REVISED RECORD SERIES FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275 - JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

Page _____ Of _____

1. DEPARTMENT/AGENCY: Hagerstown

2. DIVISION:

3. UNIT: Purchasing

DEFINITION - Records 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: Insurance Policy's

5. EARLIEST YEAR / LATETEST YEAR: 1973 TO 1999

6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series Include the purpose or function of the Series)

Contains, but not limited to: Various Insurance Policies covering — Vehicle - Equipment - Police Dept; Fire; ~~Etc.~~ Steam Boilers - ETC.

7. RECORD SERIES FORMAT(S)

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

8. RECORD SERIES SEQUENCE

- ☐ Alphabetical
- ☑ Numerical
- ☐ Chronological
- ☐ Geographical
- ☐ Other (Specify) _____

Date

9. VOLUME

- ☐ File Drawer(s)
- ☐ Microfilm Reel (s)
- ☐ Computer Tape (s)
- ☑ Other (Specify) Boxes

2 Number Cu. Ft.

10. ANNUAL ACCUMULATION

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

_____ Number

11. FILE IS USED

☐ Daily ☐ Weekly ☐ Monthly

12. FILE BECOMES INACTIVE AFTER

_____ Number ☐ Month(s) ☐ Year(s)

13. CURRENT LOCATION(S) (Bldg., Floor, Room)

Memorial Hgtty.

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 any hardware/software)

☐ Yes _____ ☑ No

18. RECOMMENDED RETENTION Retain for Life of Policy plus 3 years, then destroy.

19. NAME AND TITLE OF PREPARER

20. TELEPHONE NUMBER

21. DATE

DGS 550-4 Revised 1/93

INSTRUCTIONS -- TYPE OR PRINT A SEPARATE FORM FOR EACH NEW REVISED RECORD SERIES FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275 - JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

Page _____ Of _____

1. DEPARTMENT/AGENCY: Hagerstown

2. DIVISION: Admin/Finance

3. UNIT: Purchasing

DEFINITION - Records 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: Material Safety Data

5. EARLIEST YEAR / LATETEST YEAR: 1985 TO Current

6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series Include the purpose or function of the Series)

Material Safety Data Sheets; Technical Data; Correspondence

7. RECORD SERIES FORMAT(S)

- [x] Letter Size
- [ ] Microfilm
- [ ] Legal Size
- [ ] Computer Tape
- [ ] Bound Book
- [ ] Floppy Disk
- [ ] Audio Tape
- [ ] Video Tape
- [ ] Other (Specify) _____

8. RECORD SERIES SEQUENCE

- [x] Alphabetical
- [ ] Numerical
- [ ] Chronological
- [ ] Geographical
- [ ] Other (Specify) _____

9. VOLUME

- [x] File Drawer(s)
- [ ] Microfilm Reel (s)
- [ ] Computer Tape (s)
- [ ] Other (Specify) _____

1 Number CU. FT.

10. ANNUAL ACCUMULATION

- [ ] File Drawer (s)
- [ ] Microfilm Reel (s)
- [ ] Computer Tape(s)
- [ ] Other (Specify) _____

_____ Number

11. FILE IS USED

- [ ] Daily
- [ ] Weekly
- [ ] Monthly

12. FILE BECOMES INACTIVE AFTER

_____ Number
- [ ] Month(s)
- [ ] Year(s)

13. CURRENT LOCATION(S) (Bldg., Floor, Room): Memorial Hgtty - Off.

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 any hardware/software)

- [ ] Yes _____
- [x] No

18. RECOMMENDED RETENTION: Retain until updated or superseded, Then destroy

19. NAME AND TITLE OF PREPARER

20. TELEPHONE NUMBER

21. DATE

DGS 550-4 Revised 1/93

INSTRUCTIONS -- TYPE OR PRINT A SEPARATE FORM FOR EACH NEW 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

AGENCY RECORDS INVENTORY

Page ____ Of ____

1. DEPARTMENT/AGENCY: Hagerstown

2. DIVISION: Admin/Finance

3. UNIT: Purchasing

DEFINITION - Records 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: Bids, Quotes, Proposals

5. EARLIEST YEAR / LATETEST YEAR: 1995 TO CURRENT

6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series Include the purpose or function of the Series)

Contains, but Not Limited To: Bid Packages; Insurance Requirements; Name & Address List of Vendors receiving Bids Packages; Tabulation sheet; Brochures; Correspondence; Etc.

7. RECORD SERIES FORMAT(S)

- [x] Letter Size
- [ ] Microfilm
- [ ] Legal Size
- [ ] Computer Tape
- [ ] Bound Book
- [ ] Floppy Disk
- [ ] Audio Tape
- [ ] Video Tape
- [ ] Other (Specify) ____

8. RECORD SERIES SEQUENCE

- [ ] Alphabetical
- [x] Numerical
- [ ] Chronological
- [ ] Geographical
- [ ] Other (Specify) ____

Bid No.

9. VOLUME

- [x] File Drawer(s)
- [ ] Microfilm Reel (s)
- [ ] Computer Tape (s)
- [ ] Other (Specify) ____

14 Number CU. FTs

10. ANNUAL ACCUMULATION

- [ ] File Drawer (s)
- [ ] Microfilm Reel (s)
- [ ] Computer Tape(s)
- [ ] Other (Specify) ____

____ Number

11. FILE IS USED

- [x] Daily
- [ ] Weekly
- [ ] Monthly

12. FILE BECOMES INACTIVE AFTER

____ Number [ ] Month(s) [ ] Year(s)

13. CURRENT LOCATION(S) (Bldg., Floor, Room)

Memorial Hgtty.

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 any hardware/software)

- [ ] Yes ____
- [x] No

18. RECOMMENDED RETENTION

Retain for 5 years and until all audit requirements have been fulfilled, then destroy.

19. NAME AND TITLE OF PREPARER

DGS 550-4 Revised 1/93

INSTRUCTIONS -- TYPE OR PRINT A SEPARATE FORM FOR EACH NEW 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

AGENCY RECORDS INVENTORY

Page ____ Of ____

1. DEPARTMENT/AGENCY: Hagerstown

2. DIVISION: Admin/Finance

3. UNIT: Purchasing

DEFINITION - Records 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: Purchase Orders

5. EARLIEST YEAR / LATETEST YEAR: 1994 TO CURRENT.

6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series Include the purpose or function of the Series)

CONTAINS, BUT NOT LIMITED TO: P.O.S - SALES ORDER FORM - REQUISITION; PICKING SLIP; PACKING SLIP; ETC.

7. RECORD SERIES FORMAT(S)

- [x] Letter Size
- [ ] Microfilm
- [ ] Legal Size
- [ ] Computer Tape
- [ ] Bound Book
- [ ] Floppy Disk
- [ ] Audio Tape
- [ ] Video Tape
- [ ] Other (Specify) ____

8. RECORD SERIES SEQUENCE

- [x] Alphabetical
- [ ] Numerical
- [ ] Chronological
- [ ] Geographical
- [ ] Other (Specify) ____

9. VOLUME

- [x] File Drawer(s)
- [ ] Microfilm Reel (s)
- [ ] Computer Tape (s)
- [ ] Other (Specify) ____

30 Number CU. FT.

10. ANNUAL ACCUMULATION

- [ ] File Drawer (s)
- [ ] Microfilm Reel (s)
- [ ] Computer Tape(s)
- [ ] Other (Specify) ____

____ Number

11. FILE IS USED

- [x] Daily
- [ ] Weekly
- [ ] Monthly

12. FILE BECOMES INACTIVE AFTER

____ Number [ ] Month(s) [ ] Year(s)

13. CURRENT LOCATION(S) (Bldg., Floor, Room): MEMORIAL Hgtty-OFF

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 any hardware/software)

- [ ] Yes ____
- [x] No

18. RECOMMENDED RETENTION

Retain for 5 years and until all audit requirements have been fulfilled, then destroy.

19. NAME AND TITLE OF PREPARER

DGS 550-4 Revised 1/93

INSTRUCTIONS – TYPE OR PRINT A SEPARATE FORM FOR EACH NEW 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

AGENCY RECORDS INVENTORY

Page ____ Of ____

1. DEPARTMENT/AGENCY: Hagerstown

2. DIVISION:

3. UNIT: Purchasing

DEFINITION - Records 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: Insurance * Open claims / closed claims

5. EARLIEST YEAR / LATETEST YEAR: 1991 TO Current

6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series. Include the purpose or function of the Series): Contains, but not limited to: open claims against the City — correspondence, check request — handwritten notes — court memorandum + order to dismiss —

* against the city

7. RECORD SERIES FORMAT(S)

- [x] Letter Size
- [ ] Microfilm
- [ ] Legal Size
- [ ] Computer Tape
- [ ] Bound Book
- [ ] Floppy Disk
- [ ] Audio Tape
- [ ] Video Tape
- [ ] Other (Specify) ____

8. RECORD SERIES SEQUENCE

- [ ] Alphabetical
- [x] Numerical
- [ ] Chronological
- [ ] Geographical
- [ ] Other (Specify) ____

Date/claim #

9. VOLUME

- [x] File Drawer(s)
- [ ] Microfilm Reel (s)
- [ ] Computer Tape (s)
- [ ] Other (Specify) ____

7 Number Cu. Ft.

10. ANNUAL ACCUMULATION

- [ ] File Drawer (s)
- [ ] Microfilm Reel (s)
- [ ] Computer Tape(s)
- [ ] Other (Specify) ____

____ Number

11. FILE IS USED

- [x] Daily
- [ ] Weekly
- [ ] Monthly

12. FILE BECOMES INACTIVE AFTER

____ Number [ ] Month(s) [ ] Year(s)

13. CURRENT LOCATION(S) (Bldg., Floor, Room): Memorial Hgtty

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 any hardware/software)

[ ] Yes ____ [x] No

18. RECOMMENDED RETENTION: Retain for 2 years after settlement of the claim, then destroy.

19. NAME AND TITLE OF PREPARER

20. TELEPHONE NUMBER

21. DATE

DGS 550-4 Revised 1/93

INSTRUCTIONS – TYPE OR PRINT A SEPARATE FORM FOR EACH NEW 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

AGENCY RECORDS INVENTORY

Page ____ Of ____

1. DEPARTMENT/AGENCY: Hagerstown

2. DIVISION:

3. UNIT: Purchasing

DEFINITION - Records 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: Insurance Claims Against Individuals

5. EARLIEST YEAR / LATETEST YEAR: 1995 TO Current

6. RECORD SERIES DESCRIPTION (Briefly describe the types of information/documents/forms found in the Series Include the purpose or function of the Series)

Contains, but not limited to: Correspondence, Repair Work Sheet - Repair Invoice, Judgement in Default Entered. Certificate of Service; Proof of Claim; Notice of Order of Recusal;

7. RECORD SERIES FORMAT(S)

- [x] Letter Size
- [ ] Microfilm
- [ ] Legal Size
- [ ] Computer Tape
- [ ] Bound Book
- [ ] Floppy Disk
- [ ] Audio Tape
- [ ] Video Tape
- [ ] Other (Specify) ____

8. RECORD SERIES SEQUENCE

- [ ] Alphabetical
- [x] Numerical
- [ ] Chronological
- [ ] Geographical
- [ ] Other (Specify) ____

Date/claim #

9. VOLUME

- [x] File Drawer(s)
- [ ] Microfilm Reel (s)
- [ ] Computer Tape (s)
- [ ] Other (Specify) ____

2 Number Cu. Ft.

10. ANNUAL ACCUMULATION

- [ ] File Drawer (s)
- [ ] Microfilm Reel (s)
- [ ] Computer Tape(s)
- [ ] Other (Specify) ____

____ Number

11. FILE IS USED

- [ ] Daily
- [ ] Weekly
- [ ] Monthly

12. FILE BECOMES INACTIVE AFTER

____ Number [ ] Month(s) [ ] Year(s)

13. CURRENT LOCATION(S) (Bldg., Floor, Room): Memorial Hqtrs.

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 any hardware/software)

[ ] Yes ____ [x] No

18. RECOMMENDED RETENTION: Retain for 2 years after settlement of the claim, then destroy.

19. NAME AND TITLE OF PREPARER

20. TELEPHONE NUMBER

21. DATE

DGS 550-4 Revised 1/93