

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

Schedule No. M-206
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Agency The Town of Union Bridge Carroll County, Maryland	Division/Unit The Town of Union Bridge
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Item No.	Description	Retention
1	Agendas/Minutes of All Meetings of Mayor and Town Council (Open, Closed and Executive)	Retain permanently, transfer periodically to State Archives
2	Brief Materials for Mayor and Council (if not part of Minutes)	1 year, then destroy
3	Agendas/Minutes of Meetings of Planning and Zoning Commission (Open and Closed)	Retain permanently, transfer periodically to State Archives
4	Charter and Amendments to Charter	Retain permanently, transfer periodically to State Archives
5	Ordinances and Resolutions	Retain permanently, transfer periodically to State Archives
6	Tape Recordings - meetings and public hearings	4 years, then destroy
7	Miscellaneous Public Hearing Files a) Resulting in Legislation b) Resulting in Non-legislative action c) Resulting in No Action	a) Retain permanently, transfer periodically to State Archives b) 3 years after resolution of subject matter, then destroy c) 3 years, then destroy
8	Oaths of Office	Retain permanently, transfer periodically to State Archives
9	Deeds, Easements and other recorded land instruments	Retain permanently, transfer periodically to State Archives

See Page 7 for schedule
 Authorization.

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Item No.	Description	Retention
10	Annexation Petitions, Agreements, file of proceedings	Retain permanently, transfer periodically to State Archives
11	Other Petitions a) filed pursuant to specific law b) Resulting in no action c) Resulting in some form of relief or discretionary action	a) Retain permanently, transfer periodically to State Archives b) 3 years, then destroy c) Retain permanently, transfer periodically to State Archives
12	Proclamations	Retain permanently, transfer periodically to State Archives
13	Board of Zoning Appeals a) Official Decisions b) Reference materials	a) Retain permanently, transfer periodically to State Archives b) Retain permanently, transfer periodically to State Archives if relevant to permanent use of property; if unnecessary for permanent land use regulation, retain 1 year then destroy
14	Board of Zoning Appeals, applications and files of proceedings	Retain permanently, transfer periodically to State Archives
15	Building Permits	Retain permanently, transfer periodically to State Archives
16	Building Permits, application file of proceedings	3 years, then destroy

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Item No.	Description	Retention
17	Franchise Agreements	Retain for life of the agreement, plus 4 years, then destroy
18	Miss Utility Tickets	4 years, then destroy
19	Town Construction Projects	Retain for life of structure, plus 1 year, then destroy
20	Audit Reports a) External b) Internal	a) Retain permanently, transfer periodically to State Archives b) 4 years, then destroy
21	Election Supervisors Reports	12 years, then destroy
22	Election Records a) Ballots b) Returns	a) 6 months, then destroy b) Retain permanently, transfer periodically to State Archives
23	Registration Rolls (elections)	2 years, then destroy
24	Bank Account (open) Statements	4 years, then destroy
25	Bank Account (closed) Statements	1 year, then destroy
26	Canceled Checks, Stubs and Register	4 years, then destroy
27	Receipt Books	4 years, then destroy
28	Insurance Policies	21 years after expiration, then destroy

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Item No.	Description	Retention
29	Certificates of Insurance	4 years (after work complete), then destroy
30	Contracts	4 years (after completion of performance), then destroy
31	Leases	4 years (after termination), then destroy
32	General Correspondence - Paper	Upon receipt screen for value, destroy if no value, retain 4 years if continuing value, then destroy
33	General Correspondence - E-mail	Upon receipt screen for value, destroy if no value, retain 4 years if continuing value, then destroy
34	Documents executed by Mayor and/or Council (unless otherwise provided)	
	a) Executive Orders	Retain permanently, transfer periodically to State Archives
	b) Administrative/Ministerial	b) 4 years, then destroy
35	Employee Files	4 years after termination of employment, then destroy
36	W-4/W-2/FICA/Withholding/940/941 payroll forms and information	7 years, then destroy
37	Leave Slips	4 years, then destroy

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Item No.	Description	Retention
38	Pension Records/Information	Retain until inactive, plus 4 years, then destroy
39	Financial Disclosures (containing confidential information of private citizen or entity)	Destroy immediately after use
40	Financial Disclosures (public by law)	5 years, then destroy
41	Invoices	4 years after paid, then destroy
42	Lien Release Forms on Property Transfers	1 year, then destroy
43	Mortgages, Notes, Loan Documents	1 year after loan satisfied, then destroy
44	Bonds	1 year after satisfied, then destroy
45	Parking Citations (fines/late charges collected)	1 year, then destroy
46	Parking Citations (uncollected)	4 years, then destroy
47	Real Estate Tax Rolls	Retain permanently, then transfer to State Archives after 5 years
48	Personal Property Tax Rolls	5 years, then destroy
49	Real Estate and Corporate Tax Bills	4 years
50	Records Management Policies (Current)	Retain until superseded plus 12 years, then destroy

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Item No.	Description	Retention
51	Town Newsletter	Retain permanently, transfer periodically to State Archives
52	Vehicle Titles	Retain copy 3 years after sold sale or disposal, then destroy
53	Vehicle Maintenance Records	Life of Vehicle plus one year, then destroy
54	Water/Sewer Lab Test Results	Retain permanently, transfer periodically to State Archives
55	Chemical Information Lists/ Environmental Reports	Retain permanently, transfer periodically to State Archives
56	Water/Sewer Billing Receipts (from residents)	Retain paper until electronic record created and verified, then destroy. Retain electronic file for 7 years, then delete
57	Expired Contracts	4 years, then destroy
58	Town/County Agreements	Retain permanently, transfer periodically to State Archives
59	Complaints (not part of Minutes)	3 years, then destroy

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Item No.	Description	Retention
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Schedule Approved by Department, Agency, or Division Representative	Schedule Authorized by State Archivist
Date <u>July 27, 2006</u>	Date <u>16 Aug 06</u>
Signature <u>Violette Hobbs</u>	Signature <u>Edward C. Papenfuss</u>
Typed Name <u>Violette Hobbs</u>	
Title <u>Clerk-Treasurer</u>	