

REQUEST FOR RECORDS RETENTION SCHEDULE  
To be Submitted to the Records Management Division,  
Hall of Records Commission

1. Requesting Agency  
**Department of Mental Hygiene**

2. Division or Bureau of Requesting Agency  
**Clifton T. Perkins State Hospital,  
Business Manager**

3. Authorization Requested (Check only one of the squares below).

- A** Dispose of present accumulation. No additional accumulation is anticipated. Records have ceased to have value to warrant retention.
- B** Establish retention schedule for records for which there is a continuing accumulation. The records will cease to have value to warrant their retention after the period of time indicated.
- C** Microfilm and destroy originals. Originals if not microfilmed would be retained for the period of time indicated.

4. Item No.

5. Description of Records  
Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

6. Recommendation of Hall of Records and Board of Public Works.

1 PATIENTS' MEDICAL RECORDS

Quantity: 3 open shelves, active; 5 open shelves, inactive;  
4 file drawers, nonrecord

Size: Letter

Dates: 1959...

File Arrangement: Internal - Chronological  
External - Alphabetical by patient

Index: DMH 500 Master Register of Hospital Patients -  
One open card file, active; one card file drawer, inactive

The patient medical record folder contains all or some of the following papers:-

- Correspondence with correctional institutions relating to individual patients
- Transfer authorizations
- Description of patient
- Admission data and memoranda
- Copies of receipts for prisoners
- Writs of habeas corpus
- Patient movement sheets
- Statistical data sheet
- Psychiatric notes
- Physical examinations
- Treatment cards
- Medical and nursing notes - Summaries (See Item 2)
- Medication records
- Reception interview
- Nursing service notes
- Medical office statements
- Patient photographs
- Accident reports

(continued)

7. Agency, Division or Bureau Representative

*Leonard E. Albert* Signature **ALBERT** Title \_\_\_\_\_ Date 10/15/64

Schedule Authorized as Indicated in Col. 6 by Hall of Records Commission.

11/4/64 *Morris S. Oswald* Archivist

Disposal Authorized as Indicated in Col. 6 by Board of Public Works.

11/10/64 *Richard H. ...* Secretary

(Caricatures - Taken filed)

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1 (cont.)

Record folders are transferred from the active to an inactive file upon discharge or death of the patient. Four file drawers of non-record material (extra carbon copies of medical and nursing reports) are filed separately and may be destroyed when legal or administrative value ceases; this material is considered nonrecord within the meaning of the statute governing nonrecord material (Annotated Code of Maryland, 1957 edition as amended, Art. 41, Sec. 179).

RECOMMENDATION: RETAIN FOR FIVE YEARS AFTER DISCHARGE OR DEATH OF THE PATIENT, THEN MICROFILM AFTER ELIMINATING DUPLICATION OF RECORDS; DESTROY FILES AND RETAIN MICROFILM PERMANENTLY.

2

**MEDICAL AND NURSING NOTES AND MEMORANDA**

Quantity: 5 legal files (est.)

Dates: 1959...

File Arr.: Alphabetical and/or chronological

These files are composed of the individual doctors', nurses' and attendants' daily memoranda and notes relating to the treatment of patients. These notes are summarized periodically and placed in the Patients' Medical Records (Item 1) which will be microfilmed. The rough notes are considered to be nonrecord within the meaning of the statute (Ann. Code of Maryland, 1957 edition as amended, Art. 41, Sec. 179), and may be destroyed as soon as no longer needed by the office, since they are "housekeeping type" records.

3

**PERSONNEL FILES (EMPLOYEE FOLDERS)**

Size: Letter size

Dates: 1959...

Quantity: 5 file drawers (2 active, 3 inactive)

File Arr.: Alphabetical, by name of employee

The Personnel Files contain all or some of the following papers:-

<u>Form No.</u>	<u>Title</u>
MS 100	Application for State Employment
----	Correspondence
MS 200	Notice to be Admitted to the Test (copy)
MS 104	Labor Registry Application
MS 350	Request for Temporary Appointment
MS 406	Medical Examination for Appointment
SF 1	First Report of Injury
CT 8	Security Questionnaire
----	Rating Questionnaire
----	Notice of Employment
A-1-60	Employee Questionnaire
SFC 156	Medical Examination for Employment
CTP	Evaluation Sheet
----	Reprimands and Exhibits
SFC 4A	Disciplinary Suspension Form
----	Suspension Request
CTP	Time Cards

(continued)

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3 (cont.)

Form No.	Title
----	Office Payroll Memo
CTP	Request for X-ray Examination
BL 11	Syphilis Serology
ERS #2	Employee's Retirement System Application
W-4	Employee's Withholding Exemption Certificate
MW 507	Employee's Maryland Withholding Exemption Certificate
CTP	Employee's Record Sheet (attendance)
CD-NS-5-60	Report of Employee:- Accident or injury
CTP	Clothing Receipt
A-3-60	Monthly Probationary Reports
----	Letter of Resignation
P-2-60	Employee's Release
CB 103	Cut-Off Information Record for file of State Commissioner of Personnel
RECOMMENDATION: RETAIN FOR FOUR YEARS AFTER TERMINATION OF EMPLOYMENT, THEN DESTROY.	

4

**EMPLOYEE HISTORY CARDS**

Size: 5" x 8" cards  
 Dates: 1959...  
 Quantity: 4 visible card trays  
 File Arr.: Alphabetical, by name of employee

The Employee History Cards are composed of two cards for each employee: (1) History Card, and (2) Rating Card. The History Card gives the name, address and telephone number of the employee, the employee number, his sex and color, name of person to be notified in case of accident, employee's birth date and marital status, the department number, employee's Social Security number, his retirement number, rate, date of retirement enrollment, date of approval of physical examination, veteran's number (if any), education code number, locker number, date of appointment and title of position, starting salary, with salary and position changes and dates, termination date and reason for leaving, and remarks. The Rating Card has space for efficiency ratings, names of the raters, and any disciplinary actions taken, with the reasons, dates and results of such actions.

RECOMMENDATION: RETAIN FOR FOUR YEARS AFTER TERMINATION OF EMPLOYMENT, THEN DESTROY.

5

**LEAVE RECORD CARDS**

Size: 5" x 8" cards  
 Dates: 1962...  
 Quantity: 9 visible card trays  
 File Arr.: Alphabetical, by name of employee  
 Audit: State

Leave is recorded by the visible method under the name of the employee, giving the month and day, the type of leave taken, and the type of leave earned, including compensatory leave.

(continued)

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5 (cont.) **RECOMMENDATION:**

- A. RETAIN EMPLOYEE'S LAST LEAVE RECORD CARD PRIOR TO TERMINATION OF SERVICE FOR FOUR YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, THEN DESTROY.
- B. RETAIN ALL OTHER LEAVE RECORD CARDS FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, THEN DESTROY.

6 **EMPLOYEE'S STATUS CARD (MASTER AUTHORIZATION CARD)**

Quantity: 2 file drawers  
Dates: 1959...  
Audit: State audit

The Master Authorization Card was replaced in 1964 by the Employee's Status Card, a punched card with interpretation.

These cards are the authorization for placing an employee's name on the payroll and for changes in pay or status. The Employee's Status card is returned to the Commissioner of Personnel after the information is transferred to the office personnel records.

The recommendation below therefore applies principally to the old Master Authorization Cards but would also apply to the new form if it were retained by the office.

**RECOMMENDATION:** RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, THEN DESTROY.

7 **GENERAL PERSONNEL FILE**

Size: Letter size  
Dates: 1959...  
Quantity: 1 file drawer  
File Arr.: Alphabetical, by subject

The contents of this file include reports and studies and general material relating to employees and employee-employer relations, as follows:-

<u>Form No.</u>	<u>Description</u>
MS 330, 330-A	Certification of Eligibles Commissioner of Personnel - Policies & Procedures Grievance Committee Orientation Programs Overtime Personnel Managers Physicians
BB 40	Position Requests Problems and Recommendations Reclassification Requests
ERS 6	Reclassifications - Pending and completed Employee Regulations Retirement System Certification of Rates and Contributions Salaries and Adjustments

(continued)

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(cont.)

Staffing in General  
Turnover  
Vacancies  
Wasserman  
X-rays

Material having continuing legal or administrative value to the operation of the office should be retained until such value ceases.

Printed and mimeographed material and blank forms are considered nonrecord within the meaning of the statute governing nonrecord material (Ann. Code of Maryland, 1957 Ed. as amended, Art. 41, Sec. 179), and may be destroyed as soon as no longer needed by the office.

RECOMMENDATION: RETAIN FOR THREE YEARS, THEN DESTROY.

8 GENERAL LEDGER

Quantity: 2 vols.  
Size: 12" x 14" x 4"  
Dates: 1959...  
Audit: State

This record is the final book of entry, arranged by accounts which are updated periodically from the General Accounting Records (Item 12).

RECOMMENDATION: RETAIN PERMANENTLY.

9 BUDGET LEDGER CARDS

Quantity: 1 ledger tray; 2 bundles  
Size: 13" x 13" cards  
Dates: 1959...  
File Arr.: Numerical, by program number  
Audit: State

The Budget Ledger cards give the program and object numbers and the title of the item, with space for 58 entries (front and back), under Current Transactions and Cash Transactions. The Current Transactions section of the card gives the date, requisition or purchase order number, the reference, encumbrances and adjustments, and the unencumbered balance. The Cash Transactions section gives the date and reference, budget credits, expenditures, and the cash balance.

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, THEN DESTROY.

10 PATIENTS' LEDGER CARDS

Size: 13" x 13" cards  
Dates: 1959...  
Quantity: 1 ledger tray  
Audit: State

The Patients' Ledger Cards record receipts and withdrawals of patients' personal funds, one card for each patient, giving the name and date, the check or receipt number, and the amount deposited or

(continued)

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10 (cont.)	withdrawn, with the balance carried forward. This information is also included in the General Ledger (Item 8).	
	<b>RECOMMENDATION:</b> RETAIN FOR FOUR YEARS AFTER THE DEATH OR DISCHARGE OF A PATIENT OR UNTIL AUDITED, WHICHEVER IS LATER, THEN DESTROY.	
11	<b>INVENTORY RECORDS</b>  Quantity: 25 visible card trays Size: 5" x 8" cards Dates: 1960... File Arr.: By object or commodity  An itemized inventory is maintained for:  1. Fixed Assets Land, Improvements, and Buildings (Form B.P.Inv. 4-53) Motor Vehicle Equipment (Form B.P.Inv. 3-53) Institutional and Office Equipment (Form B.P.Inv. 2-53)  2. Materials and Supplies (Expendables) Office Supplies - Program I Food and Related Commodities - Program II Fuel Oil, Maintenance Materials and Wearing Apparel - Prog. III Cosmetics, Drugs and Medical Supplies, and Uniforms - Prog. IV Recreation - Program V  Annual Reports are made on the basis of these inventories to the Department of Budget and Procurement for Fixed Assets (Form B.P. Inv. R 101) and for Materials and Supplies (Form B.P. Inv. R 102). See Item 12.  Recommendation A below applies only to the inventory cards for Fixed Assets, and Recommendation B applies only to the cards for Materials and Supplies.  <b>RECOMMENDATION:</b> A. RETAIN INVENTORY CARDS FOR FIXED ASSETS UNTIL THE ITEM IS DISPOSED OF OR REPLACED AND FOR THREE YEARS THEREAFTER OR UNTIL AUDITED, WHICHEVER IS LATER, THEN DESTROY. B. RETAIN INVENTORY CARDS FOR MATERIALS AND SUPPLIES UNTIL THE CARD IS REPLACED AND FOR THREE YEARS THEREAFTER OR UNTIL AUDITED, WHICHEVER IS LATER, THEN DESTROY.	
12	<b>ACCOUNTING RECORDS</b>  Quantity: 10 file drawers Dates: 1959... File Arr.: Chronological Audit: State  This item includes all standard State accounting forms, as well as general accounting records which are supporting data to the permanently retained General Ledgers or other books of final entry. In cases in which General Ledgers are not maintained or may be missing	(continued)

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12 (cont.)

for certain periods, the Cash Receipts and Disbursements Journals or the Counter Cash Books are considered the books of final entry and are to be retained permanently. (Recommendations A and B, below). All other records are considered to have value only for the three-year statutory limitation or, if subject to audit, for three years or until audited, whichever is later. (Recommendation C, below.)

All or some of the following accounting records are found in each State, county or municipal agency:-

Form No.

Comptroller of the Treasury

	Memorandum of Adjustment
E-1-S	Distribution of Charges
E-1 & E-1/2	Transmittal
DD-1	Certificate of Deposit and Bank Deposit Slip
R-2 (formerly MR-2)	Monthly Report of State Funds Collected and Deposited
	Distribution of Unexpended and Obligated Balances
	Monthly Statement of Balances
	Transmittals (General Schedule G-5, Item 3)
	Warrants, Paying & Receiving (General Schedules G-3 & G-4, Item 3)

On the last two items above, the State Treasurer's copies are either permanently retained or microfilmed.

Purchasing Bureau (Department of Budget & Procurement)

1-A	Requisition for Supplies (also Agency Interoffice Reqn.)
47-A	Purchase Order
100-16	Out-of-Schedule Requisition for Supplies
39-A & 40-A	Stores Requisition
CF-2 & CF-3	Copy of Contract Awarded
27-A	" " " "
100-24	Actual Emergency & Repairs Report
26-A	Notice of Award of Contract
51	Report of Partial Delivery
52	Credit Memorandum

Budget Bureau (Dept. of Budget & Procurement)

BB-1 (Revised, formerly BB-1 & BB-2)	Budget Schedule Amendment
BP Inv. R101	Report of Fixed Assets
BP Inv. R102	Report of Materials & Supplies
BP Inv. 31-6	Materials and Supplies Physical Inventory
BP 1-11	Budget Estimates
BB-40	Request for Position Action

General Accounting Records

Audit Reports (Recommendation A, below)  
General Ledgers (Rec. A, below)  
Receipts and Disbursements Journals and Counter Cash Books (Rec. B, below)  
Receipt copies and stubs, including tax receipts  
Paid bills and invoices  
Bank deposit slips and receipts

(continued)

REQUEST FOR RECORDS RETENTION SCHEDULE  
(Continuation Sheet)

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12 (cont.)

General Accounting Records (continued)

- Bank statements
- Check stubs and canceled checks
- Cashiers' reports
- Cash register tapes
- General Fund cash receipts
- Memorandum Receipt and Property Condemnation Reports, P-3
- Requisitions for Supplies and Material (internal)
- Bid form
- Confirming order
- Receiving Reports, DMH P2-61, B-108
- Delivery Order and Receipt, P-7
- Stock Record Card, P-1
- Inventory work sheets
- Daily Store Records, DM 8-D1 and D2
- Payroll maintenance cards
- Notice of cut-off or change within agency
- Daily and Monthly Time Sheets
- Priority data
- Power plant utility reports
- County Patient Maintenance Bills, DMH-101
- Cafeteria Feeding Reports
- Dietary reports
- Special dietary reports
- Daily Menus, DM 8, D 4
- Table Journals
- Food Report
- Meal Books
- Canteen Receipts and Withdrawal Tickets
- Farm Report
- Occupational therapy cash receipts
- Recreation Fund receipts

Payroll Accounting

- Payroll Journal (General Schedule G-2, Item 1-d)
- Payroll Exceptions, Additions and Deductions (Gen. Sched. G-2, Item 2-b)
- Payroll Warrants (Gen. Sched. G-3, Item 3)
- Payroll Transmittals (Gen. Sched. G-5, Item 3)

State Treasurer's copies of the above four records series are either permanently retained or microfilmed.

- RECOMMENDATION:
- A. RETAIN GENERAL LEDGERS PERMANENTLY.
  - B. RETAIN RECEIPTS AND DISBURSEMENTS JOURNALS OR COUNTER CASH BOOKS PERMANENTLY ONLY WHEN GENERAL LEDGERS ARE NOT FOUND FOR THE PERIOD COVERED BY JOURNALS OR CASH BOOKS. OTHERWISE, RECOMMENDATION "C" APPLIES.
  - C. RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, THEN DESTROY.

13

GENERAL FILE  
Size: Letter size

(continued)



REQUEST FOR RECORDS RETENTION SCHEDULE  
(Continuation Sheet)

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13 (cont.)	<p>Dates: 1959...</p> <p>Quantity: 5 file drawers (1 for budget papers)</p> <p>File Arr.: Alphabetical, by subject</p> <p>The General File consists of general correspondence and original, printed, and mimeographed material under the following principal headings---(The first series is subject to Recommendation "A", the second subject to Recommendation "B"):</p> <p style="text-align: center;"><u>Series I</u></p> <table border="0" style="width: 100%;"> <tr> <td style="width: 33%;">Administrative Orders</td> <td style="width: 33%;">Hall of Records</td> <td style="width: 33%;">Regulations:-</td> </tr> <tr> <td>Audit Reports</td> <td>Insurance</td> <td>Nursing Service</td> </tr> <tr> <td>Budget:-</td> <td>Legal Opinions</td> <td>Patients</td> </tr> <tr> <td>    Budgets by year</td> <td>Legislative Visits</td> <td>Visitors</td> </tr> <tr> <td>    Capital Improvement</td> <td>Loss of State Property</td> <td>Security, General</td> </tr> <tr> <td>    Budgets by year</td> <td>Mental Hygiene, Policies</td> <td>Security Reports</td> </tr> <tr> <td></td> <td></td> <td>Telephone System</td> </tr> </table> <p style="text-align: center;"><u>Series II</u></p> <table border="0" style="width: 100%;"> <tr> <td style="width: 33%;">Budget:- Amendments</td> <td style="width: 33%;">Inspection and Licenses</td> <td style="width: 33%;"></td> </tr> <tr> <td>    Forms (blank)</td> <td>Key Authorizations (Issuance of keys to personnel)</td> <td></td> </tr> <tr> <td>    Instructions</td> <td>Keying System</td> <td></td> </tr> <tr> <td>    Procurement</td> <td>Meetings, Agenda &amp; 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Parking Lot</td> <td>    Food</td> <td>Storeroom</td> </tr> <tr> <td>    Security Alteration &amp; Improvement</td> <td>    Food Linen</td> <td></td> </tr> <tr> <td>    Service Building</td> <td>Salary Projections</td> <td></td> </tr> <tr> <td>    Steel Guard Screens</td> <td>Salary and Payroll</td> <td></td> </tr> <tr> <td>    Tile Floor Covering</td> <td>Security, Council</td> <td></td> </tr> <tr> <td>    Ventilation</td> <td>Staffing</td> <td></td> </tr> <tr> <td>Food Allowance</td> <td>Staffing Patterns</td> <td></td> </tr> <tr> <td>Food Costs - Daily Reports,     (Copies filed in Cafeteria &amp;     in Dept. of Mental Hygiene)</td> <td>Supplies</td> <td></td> </tr> <tr> <td>Furnishings</td> <td>Surplus Property and Agency</td> <td></td> </tr> <tr> <td>Health Dept.</td> <td>Surveys</td> <td></td> </tr> <tr> <td>I.B.M.</td> <td>Tax Exemption</td> <td></td> </tr> <tr> <td>Incentive Awards</td> <td>Telephone Charge Sheets</td> <td></td> </tr> <tr> <td>Industrial Therapy Program</td> <td>Vehicles</td> <td></td> </tr> <tr> <td></td> <td>Volunteer Activities</td> <td></td> </tr> </table>	Administrative Orders	Hall of Records	Regulations:-	Audit Reports	Insurance	Nursing Service	Budget:-	Legal Opinions	Patients	Budgets by year	Legislative Visits	Visitors	Capital Improvement	Loss of State Property	Security, General	Budgets by year	Mental Hygiene, Policies	Security Reports			Telephone System	Budget:- Amendments	Inspection and Licenses		Forms (blank)	Key Authorizations (Issuance of keys to personnel)		Instructions	Keying System		Procurement	Meetings, Agenda & Minutes:-		Requests	Administrative		Canteen	State Board of Health and		Civil Defense	Mental Hygiene		Clothing	Object Transfers (Budget and Procurement Requests,		Commissioner of Personnel	Out-of-State Travel		Construction	Overtime Payments		Air Horn	Patient Statistics		Communications & Sound System	Planning Department (State)		Dormitory	Psychiatric Aid		Driveway & Playcourt	Public Works (State)		Electrical Equipment	Rehabilitation & Recreation		Employee Housing	Reimbursements		Generator	Reports:-		Kitchen Equipment	Commitments	Program	Laboratory Cabinets	Donable Food	Safety	Main Building	Fire	Sewing Room	Road & Parking Lot	Food	Storeroom	Security Alteration & Improvement	Food Linen		Service Building	Salary Projections		Steel Guard Screens	Salary and Payroll		Tile Floor Covering	Security, Council		Ventilation	Staffing		Food Allowance	Staffing Patterns		Food Costs - Daily Reports, (Copies filed in Cafeteria & in Dept. of Mental Hygiene)	Supplies		Furnishings	Surplus Property and Agency		Health Dept.	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Food Costs - Daily Reports, (Copies filed in Cafeteria & in Dept. of Mental Hygiene)	Supplies																																																																																																																												
Furnishings	Surplus Property and Agency																																																																																																																												
Health Dept.	Surveys																																																																																																																												
I.B.M.	Tax Exemption																																																																																																																												
Incentive Awards	Telephone Charge Sheets																																																																																																																												
Industrial Therapy Program	Vehicles																																																																																																																												
	Volunteer Activities																																																																																																																												

(continued)

REQUEST FOR RECORDS RETENTION SCHEDULE  
(Continuation Sheet)

4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.
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13 (cont.)

Material having continuing legal or administrative value to the operation of the office should be retained until such value ceases. Printed and mimeographed material and extra copies of correspondence, reports, memoranda, or other records retained in the files are considered nonrecord according to the statute (Ann. Code of Maryland, 1957 Ed. as amended, Article 41, Section 179), and may be destroyed as soon as no longer needed by the office.

- RECOMMENDATION: A. RETAIN PERMANENTLY SERIES I.  
B. RETAIN SERIES II FOR THREE YEARS, THEN DESTROY.