

RECORDS RETENTION CONTROL SCHEDULE III-GG

KILLEEN ISD

DEPARTMENTS/CAMPUSES SHOULD RETAIN RECORDS ON SITE (ACTIVE) FOR A MAXIMUM OF 2 YEARS

Retention Period: A retention period is the length of time you are legally required to keep any given record. So, the question “How long should I keep contracts?” translates to “What is the *retention period* for contracts”

Records Series: A records series is a term used to mean “a group of related records.” Each records series will include records that all serve the same function, and all have the same retention period. We assign unique numbers to each records series. One example of a records series is “accounts receivable records” (GR 1025-27). Rather than having governments list every single type of record pertaining to accounts receivable — which includes statements, cash receipts, daily cash reports, bill stubs, and several different other items — on your retention schedule, you simply list “Accounts Receivable Records.”

”Meeting minutes,” “time off requests,” and “correspondence” are all examples of *records series*

Retention Schedule (also called a Control Schedule): A retention schedule is a list of all the records series created by your government and those records’ retention periods. Local Schedule GR is an example of a retention schedule. Local Schedule GR lists all of the records series that are common to local governments. Each records series, of course, includes that series’ retention period. The document as a whole is a *retention schedule*

******* ABBREVIATIONS USED *******

AC	AFTER CLOSED
AD	ADMINISTRATIVE DECISION (EST BY DEPT/CAMPUS RECORDS COORDINATOR
AV	AS LONG AS ADMINISTRATIVELY VALUABLE (1 YEAR)
CE	CALENDAR YEAR END
CESS	CESSATION OF SERVICES
CFR	CODE OF FEDERAL REGULATIONS
FE	FISCAL YEAR END
LA	LIFE OF ASSET
PERM	PERMANENT
TAC	TEXAS ADMINISTRATIVE CODE
US	0
YR	YEAR

NEW RECORD SERIES ADDED
RECORD SERIES REMOVED OR WITHDRAWN
RECORD SERIES RETENTION PERIOD CHANGED

Revised May 23, 2018

ADMINISTRATIVE RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
1000-01a	Agendas	School Board, If the minutes describe each matter considered by the governing body	FE + 2 years
1000-01b	Agendas	Certified agendas of closed meetings.	2 years
1000-02	Dedications		Permanent
1000-03a	Minutes	Board Minutes Written minutes.	Permanent
1000-03c	Minutes	Audiovisual recordings of open meetings, except as described in (d), for which written minutes are not prepared.	2 years
1000-03d	Minutes	`	2 years
1000-03f	Minutes	Certified audiovisual recordings of closed meetings.	2 years
1000-04	Open Meeting Notices		2 years
1000-05	Ordinances Orders Resolutions	Includes ordinances, orders, or resolutions that have been repealed, revoked, or amended.	Permanent
1000-06	Petitions	Petitions from the public	Final action on petition + 2 years
1000-07	Proclamations		2 years
1000-09	Public Comment Forms	Public comment forms, citizen comment forms, registration cards, or other similar documents filled out by members of the public wishing to speak at an open meeting.	2 years

GENERAL RECORDS

SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
1000-20a	Accident Reports	Reports of accidents to adults, non students	3 years from date of report if no claim is filed; 3 years after settlement or denial of the claim if a claim is filed
1000-20b	Accident Reports	Reports of accidents to minors	Date minor reaches majority age + 3 years of no claim, 3 years after settlement if claim is filed
1000-24	Complaints	Complaints received from the public or any officer or employee	Resolution or dismissal of complaint + 2 years
1000-25	Contracts, Leases, and Agreements	Building Use Permits, Including reports, correspondence, performance bonds	4 years after expiration or termination of the instrument according to terms
1000-26a	Correspondence and Internal Memo	Employee Handbook, Employee Standard, Ethical Conduct	4 years
1000-26b	Correspondence and Internal Memo	General – Incoming/outgoing and internal correspondence pertaining to the regular operation of the policies, programs, services, or projects of a local government. May also include subject files, which are collections of correspondence, memos and printed materials on various individuals, activities, and topics.	2 years
1000-26c	Correspondence and Internal Memo	Routine - Correspondence and internal memoranda such as letters of transmittal, requests for publications, internal meeting notices, and similar routine matters. May also include subject files, which are collections of correspondence, memos and printed materials on various individuals, activities, and topics	AV
1000-26d	Correspondence and Internal Memo	Activity fund/donations	1 year
1000-26e	Correspondence and Internal Memo	Supt Board Correspondence Cy	1 year
1000-27	Deeds	Deeds, Land, Legal, title opinions, abstracts and certificates of title, title insurance, documentation concerning alteration or transfer of title, and similar records evidencing public ownership of real property.	Permanent
1000-28	Easements	Documentation relating to easements and rights-of-way for public works or other local government purposes, including releases.	Permanent
1000-29	Insurance Policies	Liability, theft, fire, health, life, automobile, and other policies for local government property and personnel including supporting documentation relevant to the implementation, modification, renewal, or replacement of policies.	4 years after expiration or termination
1000-30	Legal Opinions	Formal legal opinions rendered by counsel or the Attorney General for a local government, including any written requests for opinions, concerning the governance and administration of a local government.	Permanent
1000-31	Litigation Case Files	Includes all cases to which a local government is a party	Av after final disposition of the case + 1 year
1000-34a	Open Records/Public Infor Requests	Non exempted records and withdrawn request	Date request for records fulfilled + 1 year

1000-34b	Public Information Act Request	Exempted records	Date of exemption + 2 years
1000-36	Permits and Licenses	Application for and the issuance of permits and licenses for sales solicitation, facility usage and similar activity,	Expiration, cancellation, revocation, or denial + 2 years
1000-37	Photographs, Recordings, and Other Non-textual media	Historical Documentation (Does not include school annuals or yearbooks)	Permanent
1000-38a	Policy and Procedure Documentation	Handbook (Paraprofessional)	US + 5 years
1000-38b	Policy and Procedure Documentation	Student Handbook Receipts, Employee Handbook Receipts	1 year
1000-39	Publications	Board Newsletters	Permanent
1000-40a	Records Management Records	Records Control Schedule	US
1000-40b	Records Management Records	Records documenting the destruction of records	Permanent
1000-40c	Records Management Records	Lists or inventories of the active and inactive records created or received by a local government.	US, expired, or discontinued.
1000-40d	Records Management Records	Plans and similar documents establishing the policies and procedures under which a records management program operates.	US, expired, or discontinued + 5 years
1000-40e	Records Management Records	Transmittal Forms	Date of disposition + 2 years
1000-41a	Reports and Studies (Non Fiscal)	Annual Reports, reports Ordered by State Agency or a court	Permanent
1000-41b	Reports and Studies (Non Fiscal)	Activity reports compiled on a daily or other periodic basis pertaining to workload measures, time studies, number of public contacts, etc., except reports of similar types noted in this or other commission schedules	1 year
1000-41c	Reports and Studies (Non Fiscal)	Monthly , bimonthly, quarterly, or semi annual reports	3 years

1000-41d	Reports and Studies (Non Fiscal)	Working Papers	3 years
1000-41e	Reports and Studies (Non Fiscal)	Payroll - TRS State Reports	Permanent
1000-41f	Reports and Studies (Non Fiscal)	Safety Committee Records	5 years
1000-41g	Reports and Studies (Non Fiscal)	TEA Reports	Permanent
1000-42	Waivers of Liability	Including statements signed by volunteers acknowledging non entitlement to benefits	Date of filing + 3 years
1000-43	Conflicts Disclosure Statements	Statements and conflict of interest questionnaires submitted by local gov. officers or vendors or other persons	Date of filing + 3 years
1000-46	Insurance Claims	Claims related to liability, theft, fire, health, life, automobile, and other insurance policies	Settlement or denial of claim + 3 years
1000-52	Subpoenas	Subpoenas for production of evidence produced for litigation in which the local government is not a party.	AV after fulfilled.
1000-53	Release of Records Documents	Records that document the release of records or information through any method other than a Public Information Act request or subpoena (including employment verification).	Date records produced + 1 year
4175-16	Protective Orders	Restraining Order	AV
FINANCIAL RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
1025-01a	Audit Records	Cumulative Audit, Annual, biennial, or other periodic audit of any department, fund, account, or activity of a local government.	Permanent
1025-01b	Audit Records	Periodic, Annual, biennial, or other periodic audit of a department, program, fund, or account if included in a cumulative audit under (a).	2 years
1025-01e	Audit Records	Working papers, summaries, and similar records created for the purposes of conducting an audit.	3 years after all questions arising from the audit have been resolved
1025-02	Bank Security Records	Records documenting the pledging of bonds or securities by banks serving as depositions for public funds	4 years after obligations are met
1025-03a	Bond Records	Bond administrative records, bond registers	Permanent

1025-03b	Bond Records	Bond certificates and redeemed coupons	1 year after payment
1025-04a	Budgets and Budget Documentation	Annual budgets (including amendments).	Permanent
1025-04c	Budgets and Budget Documentation	Working papers created exclusively for the preparation of budgets, including budget requests, justification statements, and similar documents	3 years
1025-04e	Budgets and Budget Documentation	Budget Change documentation, including line item or contingency/reserve fund transfers and supplemental budget requests. Working papers, justification statements, encumbrance and expenditure reports.	2 years
1025-05a	Capital Assets	Fixed Assets: Equipment or property history cards or similar records containing data on initial cost, including disposal authorizations when disposed of.	FE of date of disposal + 5 years
1025-05c	Capital Assets	Equipment or property inventories	US + 3 years
1025-05d	Capital Assets	Property sale, auction, or disposal records	1 year
1025-07a	Financial Reports	School Board Accounting Reports, Monthly, bimonthly, quarterly, or semi-annual reports.	FE + 3 years
1025-07b	Financial Reports	Annual Reports, Long range fiscal planning reports	Permanent
1025-07c	Financial Reports	Capital improvement reports.	Permanent
1025-08	Grant Dev. And Admin. Records	Grants, Successful grant applications and proposals and any documentation that modifies the terms of a grant.	FE + 5 years
1025-08c	Grant Dev. And Admin. Records	Reports, planning memoranda, studies, correspondence, and similar records created for and used in the development of successful grant proposals.	3 years
1025-09a	Investment Transaction	Arbitrage Rebate Records Documentation relating to the investment of public funds.	FE + 5 years
1025-09b	Investment Transaction	Documentation related to the calculation of arbitrage rebate amounts, if any, on proceeds from the sale of tax-exempt bonds.	Retirement of the last obligation of the bond issue + 6 year
1025-26a	Accounts Payable and Disbursement Records	Invoices, Paid Invoices, Payment Authorization, Claims, invoices, statements, copies of checks and purchase orders, expenditure authorizations, and similar records that serve to document disbursements, including those documenting claims for and reimbursement to employees for travel and other employment-related expenses.	FE + 5 years
1025-26b	Accounts Payable and Disbursement Records	Accounts payable records sufficient to document the purchase costs of capital equipment or other fixed assets.	FE + 5 years

1025-26d	Accounts Payable and Disbursement Records	Accounts payable records for bond-funded projects.	FE of date of last bond payment + 5 years for school districts; FE of date of last bond payment
1025-27a	Accounts Receivable Records	Bill copies or stubs, statements, billing registers, account cards, deposit warrants, cash receipts, credit card receipts, receipt books, cash transfers, daily cash reports, cash drawer reconciliations, and similar records (such as returned checks and associated fees) that serve to document money owed to or received by a local government and its collection or receipt.	FE + 5 years
1025-27b	Accounts Receivable Records	Documents showing the receipt or payment of any moneys	FE + 5 years
1025-27c	Accounts Receivable Records	Account card or similar records documenting payments to a local government in which the government holds a property lien until the debt is satisfied (e.g., liens arising from demolition, lot cleaning), including original liens and lien releases	FE of date of final payment and release of lien + 3 years.
1025-27e	Accounts Receivable Records	Records of accounts deemed uncollectable, including write-off authorizations.	FE of write-off date + 5 years
1025-28	Banking Records	Bank statements, credit card statements, canceled checks, check registers, deposit slips, debit and credit notices, reconciliations, notices of interest earned, monetary transport records (including armored car pickup logs) etc.	FE + 5 years
1025-29	Cost Allocation	Print Shop Charges, chargebacks, interdepartmental or interfund accounting records	FE + 5 years
1025-30a	Ledgers, Journals, and Entry Doc.	General Journal Entries, General Ledger with Annual Audit	FE + 5 years
1025-30a2	Ledgers, Journals, and Entry Doc.	General Ledger - No Annual Audit	Permanent
1025-30c	Ledgers, Journals, and Entry Doc.	Journal Vouchers, Receipt, disbursement, general, or subsidiary journals.	FE + 5 years
1025-31c	Transaction Summaries	Activity Fund Account Monthly Report	2 years
1025-31d	Transaction Summaries	Activity Account Annual Report	FE + 5 years
1025-32	UNCLAIMED PROPERTY DOCUMENTATION	Any form of record sufficient to verify information on unclaimed property previously reported to the State Treasurer showing the name and last known address of the apparent owner of reportable unclaimed property, a brief description of the property, and the balance of each unclaimed account	Date on which property is reportable + 10 years.

PERSONNELL AND PAYROLL RECORDS

SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
1050-02a	Aptitude and Skills Test Records	Tests	2 years
1050-02d	Aptitude and Skills Test Records	Records related to the planning and admin of tests	3 years
1050-03	Awards and Commendations	Service awards/separation	Date of separation + 5 years
1050-04a	Certificates and Licenses	Certificates, licenses, or permits required of employees to qualify for or remain eligible to hold a position	US or separation of employee + 5 years
1050-04a2	Certificates and Licenses	Certificates, licenses, or permits required of employees to qualify for or remain eligible to hold a position if those applicants are not hired	2 years
1050-05	Conflict of Interest Affidavits		5 years after leaving position for which the affidavit was filed
1050-06	Counseling Program Files	Reports of interviews, analyses, and similar records relating to the counseling of an employee for work-related, personal, or substance abuse problems, or records relating to the planning, coordination, implementation, direction, and evaluation of counseling programs	3 years
1050-07	Disciplinary and Adverse Action Records	Employee termination, demotion, probation, suspension, leave without pay	2 years after case closed or action taken
1050-08a	Employee Pension and Benefits Records	Insurance Enrollment Plan, Employee Benefit Plans, Employee benefit plans such as pension; life, health, and disability insurance; seniority and merit systems; and deferred compensation plans, including amendments.	Termination of Coverage + 1 years
1050-08b	Employee Pension and Benefits Records	TRS Contributions	Date of separation + 75 years
1050-08b2	Employee Pension and Benefits Records	Cobra/Life Ins Cards, Disability Benefits, Employee Benefit Records,	Termination of Coverage + 4 years
1050-08c	Employee Pension and Benefits Records	Annual reports from a pension system or fund.	Permanent

1050-09	Employee Recognition Records	Award committee reports selection criteria, nominations, etc.	2 years
1050-10	Employee Security Records	Records created to control and monitor the issuance of keys, identification cards, passes, or similar instruments of identification and access	US, date of expiration, date of separation + 2 years
1050-11	Employee Selection Records	Notes of interviews with candidates; audio and videotapes of job interviews; applicant rosters; eligibility lists; test ranking sheets; justification statements for violating eligibility or ranking sequence; and previous injury checks; offers of employment letters; and similar records documenting the filling of a vacant position	2 years from the creation of the record
1050-12	Employee Service Record	Personnel Records, Terminated Employees , Service Records	Date of separation + 75 years
1050-13	Employment Advertisements or Announcements	Job Postings, Advertisements or postings relating to job openings, promotions, training programs, or overtime opportunities, including jobs orders submitted to employment agencies.	2 years
1050-14a	Employee Applications	Applications, transcripts, letters of ref., for both hired and non hired for promotion, transfer, or training opportunity	2 years
1050-14c	Employment Applications	Transcripts of persons hired if needed for position	Date of separation + 5 years
1050-15	Employment Contract	Contract Personnel, Employment Contract	End of Contract + 4 Years
1050-16	Equal Emp. Opp. Records and Reports	EEO Case Files	Resolution + 3 Years
1050-19	Fingerprint Cards		Date of separation + 5 years
1050-20	Grievance Records	Employee grievances against personnel policies, working conditions etc.	Final decision on the grievance + 2 years.
1050-21	Job Evaluations	Performance appraisals, or other documents used to evaluate employee	2 years
1050-22b	Medical and Exposure Reports	Health or physical exam reports if condition is a factor in hiring decisions	2 years
1050-22d1	Medical and Exposure Reports	Records of driver alcohol test results indicating an alcohol concentration of 0.02 or greater; records of driver verified positive controlled substances test results; documentation of refusals to take required alcohol and/or controlled substances tests; driver evaluation and referrals; calibration documentation; records related to the administration of the alcohol and controlled substances testing programs;	5 years

1050-22d2	Medical and Exposure Reports	Records related to the alcohol and controlled substances collection process.	2 years
1050-22d3	Medical and Exposure Reports	Records of negative and canceled controlled substances test results and alcohol test results	1 year
1050-23	Oaths of Office	Any oaths or affirmations required of local government employees or officers. Includes the Statement of Elected Officer	US +5 years
1050-24	Personnel Action or Information Notices	Documents used by personnel to create or change information in personnel records	2 years
1050-26	Position Description, Classification and Staff Monitoring Records	Salary Changes, job description, Job descriptions, including any associated task or skill statements. Also includes documentation concerning the development and analysis of job descriptions and classification systems, including survey, review and audit reports; classification standards and guidelines; selection criteria; determination of classification appeals; etc.	US or position abolished + 4 years
1050-27	Reduction in Force Plans	including any related implementation documentation	US or if implemented 2 years from date of last RIF under the plan
1050-28b	Training and Ed Achievement Records	In-service Training All Personnel, Student Teacher Files	2 years
1050-29	Unemployment Compensation Claims	Unemployment Compensation Claims and documents	After Closed + 5 years
1050-30	Verifications of Employment Eligibility	If a former employee is rehired and a Form I-9 is still on file for the employee, the 3-year retention period dates from date of first hire.	3 years from hire or 1 year after separation
1050-31	Work Schedules	Daily Tutorial Sign In, work duty, shift, crew schedules, rosters, or assignments.	1 year
1050-32a	Workers Compensation Claim Files	If the local government is not self-insured.	CE + 5 years
1050-32b	Workers Compensation Claim Files	If the local government is self-insured.	CE of closure of claim + 50 years.
1050-34	Public Access Option Form	Employee or official form electing to keep home address, phone number, SS number, and family info open or confidential under Public Info Act	US

1050-35	Employee Exit Interview	Records of interviews and other supporting documentation conducted at time of employee termination.	Date of separation + 2 years
1050-37	Employee Acknowledgement Forms	Handbook receipt	US or date of separation + 2 years
1050-39	Volunteer Service Files	Information about individual volunteers and duties they perform	US or date of separation + 3 years
1050-42	LICENSE AND DRIVING RECORD CHECKS		US or date of separation.
1050-50	Deduction Authorizations	Documentation to start, modify or stop all voluntary or required deductions from payroll, including orders of garnishment or other court ordered attach.	4 years after sep. or 4 years after amend, expiration, or termination of auth. Whichever sooner
1050-51	Direct Deposit Application/Auth		Us or date of separation
1050-52a	Earnings and Deduction Records	A record containing the following payroll information on each employee: name, last known address and social security number, amount of wages paid to the employee for each payroll period, including all deductions, and date of payment	FE + 5 years
1050-52b	Earnings and Deduction Records	A record containing the following minimum pension and deferred compensation information on each employee: name, date of birth, social security number, and amount of pension and deferred compensation deductions.	date of separation + 75 years
1050-52c	Earnings and Deduction Records	Master payroll register, including year-to-date registers, if not used to satisfy either of the retention requirements set in (a) or (b).	FE + 5 years
1050-52d	Earnings and Deduction Records	Substitute Job Verification Form	FE + 5 years
1050-52f	Earnings and Deduction Records	Payroll adjustment records, including transaction registers, authorizations, and similar records authorizing and detailing adjustments to payroll records because of overpayment, underpayment, etc.	FE + 5 years
1050-53	Federal And State Tax Forms and Reports	Payroll - Substitute W-4 Info, W-2 Info	4 years

1050-54a	Leave Records	Sick Leave; unused, accumulated	Permanent
1050-54b	Leave Records	Comp Time Reports, request and authorization of vacation	FE + 5 years
1050-55a	Payroll Action or Information Notices	Doc. Concerning hiring, termination, transfer, pay grade, position or job title, name change, etc.	2 years
1050-55b	Payroll Action or Information Notices	Documents concerning adjustments to payroll and leave status	3 years
1050-56	Time and Attendance Reports	Paraprof. Time Report, Payroll-time cards, Time sheet	4 years
1050-57	Time Change Records	Requests and authorizations for overtime, time trading, and other actions that affect normal work time except leave requests	2 years
1050-58	Reimbursable Activities	Travel Request , participation in educational programs, workshops, classes, etc.	5 years
1050-59a	Wage and Salary Rate Tables	If wage is expressed in dollars	2 years after last eff. Date
1050-59b	Wage and Salary Rate Tables	If wage is indicated by grade or step number only	Date of separation + 75 years
SUPPORT SERVICES RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
1075-01a	Bids and Bid Documentation	Successful bids and requests for proposals, including invitations to bid, bid bonds and affidavits, bid sheets, and similar supporting documentation.	FE + 5 years
1075-01b	Bids and Bid Documentation	Unsuccessful Bids	FE + 2 years
1075-01c	Bids and Bid Documentation	Quotes	1 year
1075-01d	Bids and Bid Documentation	Request for information preliminary to the procurement of goods or services by direct purchase or bid	AV after date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.
1075-02	Inventory Records	Inventory Requisition parts & supplies	1 year
1075-03a	Purchase Order and Receipt Records	Purchase orders, requisitions, and receiving reports (warehouse) STOCK	FE + 5 years

1075-03b	Purchase Order and Receipt Records	Purchasing log, register, orders issued, received (warehouse) NONSTOCK	FE + 3 years
1075-03c	Purchase Order and Receipt Records	Packing slips and order acknowledgments	AV
1075-03d	Purchase Order and Receipt Records	Vendor and commodity lists	US
1075-04	W-9 Form	W-9 IRS Form used to request a taxpayer identification number (TIN) for reporting information to IRS. This includes W-9 forms received by local governments from vendors.	Date Account is opened + 3 years
FACILITY, VEHICLE, AND EQUIPMENT MANAGEMENT RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
1075-15	Accident and Damage Reports (Property)	Reports of accidents or damage to facilities, vehicles, or equipment if no personal injury is involved.	3 years
1075-16a	Construction Project Files	Construction/Contract Project Files	Permanent
1075-16b	Construction Project Files	Records of the types described in GR1075-16a relating to the construction of prefabricated storage sheds, bus shelters, parking lot kiosks, non-structural recreational facilities such as baseball diamonds and tennis courts, and similar structures and facilities.	Completion of the project + 10 years
1075-16c	Construction Project Files	Records relating to construction projects described in GR1075-16a and GR1075-16b, that are transitory or of ephemeral relevance, and are not required for maintaining, modifying, and repurposing the building or structure. Records may include, but are not limited to, records of architectural and engineering draft design plans and specifications that precede the signed and sealed versions, delivery tickets for expendable products, daily work reports, etc.	5 years
1075-16d	Construction Project Files	Line Locate Requests, Call Before You Dig records, or other similar records documenting requests for information regarding locations of the underground cable or utility lines.	Completion of project + 2 years
1075-17	Lost and Stolen Property Reports		3 years

1075-18a	Maintenance, Repair, and Inspection Records	Routine Inspection.	1 year
1075-18a2	Maintenance, Repair, and Inspection Records	Maintenance and repair records	Life of asset
1075-18b	Maintenance, Repair, and Inspection Records	Routine cleaning, janitorial, and inspection	1 year
1075-18b2	Maintenance, Repair, and Inspection Records	facility maintenance, repair and inspection	5 years
1075-19	Service Requests/Work Orders	repairs and maintenance to facilities, vehicles, or equipment	2 years
1075-20a	Usage Reports	Usage of facilities, vehicles, and equipment, mileage, fuel consumption, copies run etc., if reports are the basis of allocating costs for determining payment under rental or lease agreement	5 years
1075-20b	Usage Reports	Reservation logs	2 years
1075-21	Vehicle Assignment Records	Assignment logs, authorizations, and similar records	2 years
1075-22	Visitor Control Registers	Visitor Control Sign In	3 years
1075-23	Warranties	vehicles and equipment	Exp. of warranty + 1 year
1075-24	Vehicle Titles and Registrations		LA

1075-25	Surveillance Videos	Video surveillance for, but not limited to, security of property and persons.	AV
1075-26	Equipment Manuals	Equipment manuals, owner's manuals, instructional manuals, or other similar documentation for government owned equipment,	LA
COMMUNICATION RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
1075-40	Postal and Delivery	Meter and permit usage records.	1 year
1075-41a	Telephone Logs or Activity Reports	If log is used for cost allocation	FE + 5 years
1075-41b	Telephone Logs or Activity Reports	If log is used for internal control purposes other than cost allocation	1 year
1075-42	E-Rate Records	All records related to the application for, receipt, and delivery of discounted telecommunications and other supported services	FE + 10 years
1075-43	Directory Information	Mailing addresses, telephone or fax numbers, or email addresses, or other contact information maintained by a local government on its employees or persons it serves.	US, expired, or discontinued
WORKPLACE SAFETY RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
4775-22	Environmental Pollution Control	Air Quality Survey	3 years
5750-01	Blood borne Pathogen Training	Records of training given to employees with exposure to blood borne pathogens showing the dates of training sessions, contents or summaries of the sessions, names and job titles of those who received training, and names and qualifications of instructors.	3 years
5750-02	Facility Chemical List	Copies of tier two forms containing information of hazardous chemicals present in local government facilities submitted to the fire chief of the fire department having jurisdiction over the facilities and to the Texas Department of State Health Services as required by Health and Safety Code, Section 506.006.	30 years
5750-04	Hazardous Materials	Records of training given to employees in a hazard communications program showing the date of each training session, subjects covered during the session, rosters of employees who attended, and the names of instructors.	5 years
5750-07	Disaster Preparedness and Recovery Plans	Disaster preparedness, continuity of operations, business continuity, or other plans used to prepare for or respond to emergencies or disasters.	US

ELECTRONIC DATA PROCESSING RECORDS

SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
5800-01	Audit Trail Records	Files needed for electronic data audits such as files or reports showing transactions accepted, rejected, suspended, and/or processed; history files/tapes; records of on-line updates to application files or security logs.	Until audit requirements met
5800-02	Finding Aids, Indexes, and Tracking Systems	Automated indexes, lists, registers, and other finding aids used to provide access to the hard copy and electronic records.	Until the related hard copy or electronic records have been destroyed
5800-04	IS/Database Records	Relatively long-lived computer files, including databases, containing organized and consistent sets of complete and accurate electronic records.	Until electronic records are transferred to and made usable in a new system environment, or the files have met a retention period
5800-04	Information System/Database	Relatively long-lived computer files, including databases, containing organized and consistent sets of complete and accurate electronic records.	Until electronic records are transferred to and made usable in a new system environment, or the files have met a retention period established in this or other commission schedule, whichever sooner.
5800-05	Processing Files	Electronic files used to produce or modify an information system or database, including, but not limited to, work files, maintenance and test files, print files, and intermediate input/output records.	Until electronic records are transferred to and made usable in a new system environment, or the files have met a retention period
5800-06	Software Programs	Automated software applications and operating system files including job control language, , etc.	Until electronic records are transferred to and made usable in a new software environment
5800-08	Technical Documentation	Source Documents, Electronic Records, Tech. Documentation	Until electronic records are transferred to and made usable in a new software environment
5800-09	Automated Program Listing/Source Code	Automated program code and builds which generate the machine-language instructions used to operate software programs.	Until superseded or software program no longer used, whichever sooner.

5825-01 -A	System Security Records	Records created for security purposes to control or monitor individual access to a system and its data, including but not limited to user account records, security login information, and password files.	US, date of expiration, or date of separation + 2 years, as applicable.
5825-01 -B	System Security Records	Records used to control and monitor the security of a system and its data, including vulnerability scans, intrusion tests, malicious code detection tests, threat and risk assessments, technical security reviews, patch management logs, intrusion detection logs, firewall logs, and related records. Records documenting incidents and investigations involving unauthorized attempted entry, probes and/or attacks on information systems or networks.	AV
5825-03	Chargeback Records to Data Processing Services Users		FE + 5 years
5825-04	Computer Job Schedules and Reports		90 days
5825-05	Data Processing Policies and Procedures		5 years after policy or procedure is withdrawn, revised, updated or superseded
5825-10	Network Circuits Inventory	Records containing information on network circuits used by the government including circuit number, vendor, type of connection, terminal series, software, contact person, and other relevant information about the circuit.	US
5825-11	Network Implementation Files	Records used to implement a computer network including reports, diagrams of network, and wiring schematics.	US
5825-12	Operating System and Hardware Conversion Plans	Records relating to the replacement of equipment or computer operating systems not included elsewhere in this schedule.	2 years after completion of conversion
5825-13	Output Records for Computer Production	Reports showing transactions that were accepted, rejected, suspended, and/or processed	AV
5825-14	Quality Assurance Records	Information verifying the quality of system, hardware, or software operations including records of errors or failures and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records needed as an audit trail to evaluate data accuracy.	Until no longer needed as audit trail
5825-15	Project Files	Records created and used in the development redesign, or modification of automated systems or applications	3 years after completion of project

5825-16	System Activity Monitoring Records	Records or logs that monitor and report levels and patterns of individual and organizational usage of system hardware, software application, and internet resources, including but not limited to log in files, system usage files, application usage files, data entry logs, print spool logs, and records of individual computer usage. May also include levels of storage and network/bandwidth traffic and other documentation related to activities for monitoring and ensuring optimal efficiency of system resource use.	AV
PROPERTY TAX COLLECTION RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3000-02	Appraisal Rolls, Amendments and Notices	Tax Amendments/Adjustments	3 years
3000-11	Tax Collection, Delinquency, and Property Value Reports	Tax Daily Collection Report monthly	FE + 3 years
3000-12	Tax correspondence	Tax Correspondence	2 years
3000-15	Tax Rate Calculation Worksheets and Notices	Tax Effective Rate	3 years
3000-16	Tax Receipts	Tax Receipts	FE + 3 years
3000-18	Tax Rolls	Tax Rolls	Real property rolls - 20 years; personal property rolls - 10 years,
ELECTION RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3100-10	Election Return Records	Election Info (Misc.)	Permanent
STUDENT ACADEMIC RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3200-01a	Academic Records	Academic achievement record or equivalent grades 9 - 12 (High School Transcripts) (K-8 if high school credit is earned during that time)	Permanent
3200-01b	Academic Records	Cumulative record grades Pre K - 12	Withdrawal + 5 yrs.

3200-02	Birthdate Documentation	Copies of birth certif., passport or other documents used to establish date of birth	AV
3200-03	Custody Documents	Copies of court instruments relating to adoption guardianship or custody	Until the student is 18 or date of withdrawal + 2 years, whichever sooner.
3200-04	Enrollment or Registration Forms	Census, Enrollment, Withdrawal (maintain in Cum folder)	Withdrawal + 5 yrs.
3200-05	Home Language Survey	Survey administered to each student to establish the student's language classification for determining whether the school district is required to provide bilingual education or English as a second language program.	Withdrawal + 5 years
3200-06a	Missing Child Prev. & ID program	Fingerprint Cards	Withdrawal
3200-06b	Missing Child Prev. & ID program	Photographs	US, Withdrawal or 3 years, soonest
3200-06c	Missing Child Prev. & ID program	Parental consents	AV after fingerprints and/or photo
3200-07	Parental Permission Records	Parental consents for a student to engage in school activities or programs. Permission to Travel	Until cessation of activity for which consent granted + 2 years or if annually renewable, US + 2 yrs.
3200-08	Student Withdrawal/Record Transfer	Both sending and receiving districts	AV
3200-09a	Test and Academic Measurement Reports	Reports of results of TAAS, TEAMS, TABS and other standardized state and national achievement, mental abilities, and aptitude tests reported by score, percentile rank, etc.	1 year after recording of data on cum record
3200-09b	Test and Academic Measurement Reports	Reports of results of other tests or measurements (e.g., reading/mathematics profiles).	Date of withdrawal + 5 years.
3200-09c	Test and Academic Measurement Reports	District summaries on a group basis of the results of standardized testing.	3 years
3200-09d	Test and Academic Measurement Reports	Testing irregularity and investigations documentation, inventory and shipping records, signed security oaths, seating charts	Date test administered + 5 years

3200-10	Ethnicity Forms	Student and Staff Ethnicity and Race Data Questionnaire	3 years or litigation, claim or audit is complete whichever is later
3200-11	Statement of Assurance for Student who is victim of a violent criminal act	School Safety Choice Option	5 years
3200-012	Student Accommodation Records	Records of accommodation requests and supporting doc. Acc. Or designated supports are changes and materials or procedures	1 year
FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3225-02a	Access to Information, Records	Documentation of request from and disclosures to the parent or student to an official, written consent from parent or eligible student, party seeking directory information	Date records produced + 1 year.
3225-02b	Access to Information, Records	Access to information to parent from student 18 or over	Permanent, retain with transcript
3225-03	Protest of Record Statement	Statement by parent or student commenting on contested information in student record or stating why they disagree with district's decision not to amend record or both	As long as the record containing contested information is maintained
3225-04	Record Amendment Requests and Related Documentation	Request from parent or student to amend student records, notices by the district of denial or consent to amendments, requests for hearings on denied requests hearing notices, and written decisions by hearing examiners	Date of final resolution +2 years.
SPECIAL EDUCATION PROGRAM RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3250-01	Enrollment Lists and Rosters	Enrollment/withdrawal logs, sending receiving log, sent received cum folders. Class list and schedule	5 yrs.
3550-02S	Student Records	Students receiving <u>SHARS</u>	FE + 7 years

3250-02	Student Records	Records of each student referred to or receiving Sp Ed services, including referral, assessment, and reevaluation reports: enrollment and eligibility forms, admission, review and dismissal (ARD) and transitional planning committee documentation; individual education (IEP) and transitional (ITP) plans; parental consent forms for testing and placement and other records of services required under federal and state regulation. Eligibility Speech, Forms, Sp Ed(Prior to the destruction of any records in the group, the eligible student or parents must be notified in accordance with federal regulation), Individual Counseling, Test Protocols of Student Re-evaluations	CESS + 5 years
3250-03	Video Surveillance, SPED	Any video and audio recorded in classroom or SPED setting	3 months
BILINGUAL AND SPECIAL LANGUAGE PROGRAM RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3250 - 08	Student Records	Records of each student referred to or receiving bilingual or special language services, including recommendations from parents or teachers for bilingual instruction, student interview documentation, notifications to parents, parental consents or denials, language proficiency assessment committee (LPAC) reports, exit reports, follow up study reports, and other records of services required by state regulation or pertinent to the id of students for bilingual ed or sp language programs	CEES + 5 years
GIFTED/TALENTED PROGRAM RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3250-16	Student Records	Records of each student referred to or receiving services in a gifted/talented program, including nomination and observation documentation, testing results, parental consents, committee reports and recommendations, and other records of services required under state regulation or pertinent to the id of students for participation in gifted/talented programs	Cessation of services + 5 years
SECTION 504 PROGRAM RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3250-20	Student Records	Records of each student referred to or receiving services under Section 504, including referral, pre-placement and reevaluation reports, parental notices; group and impartial hearing deliberations; and other records of services under Section 504 regulations. At risk students, Title 1 Compact Progress Report	CEES + 5 years
DYSLEXIA PROGRAM RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3250-26	Enrollment Lists and Rosters	Dyslexia Program Records, enrollment lists & reports	CEES + 5 years
3250-27	Student Records	Records of each student referred to or receiving dyslexia program services, including referral and assessment reports; group deliberations, parental notices; and other records of services required under state regulation	Cessation of services + 5 years
MIGRANT STUDENT RECORD TRANSFER SYSTEM			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3250-34	Enrollment and Withdrawal Reports		10 years

OTHER SPECIAL POPULATION RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3250-43	Federal Impact Aid Survey Forms	Locally designed form used to survey parents to determine eligibility for federal impact aid, survey forms of students determined to be eligible and used to complete district applications for school assistance in federally affected areas	5 years after all aid money is received
3250-44	McKinney Homeless Assistance Act Student Record		5 years
3250-45	Civil Rights Data	Biennial Civil Rights data collected	After submission of data + 5 years.
ATTENDANCE RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3275-01a	Attendance Control Documentation	Correspondence to and from parents or guardians concerning absences and tardiness	AV
3275-01b	Attendance Control Documentation	Correspondence with law enforcement or other agencies concerning violations of the compulsory school attendance law , including all associated documentation Attendance officer's logs and reports of parents or guardians visited	2 years
3275-01c	Attendance Control Documentation	Attendance officer's logs and reports of parents or guardians visited	2 years
3275-02d	Attendance Control Documentation	Documents relating to student attendance hearings and appeals	date of decision + 2 years
3275-02a	Attendance Reports	Copies of attendance and enrollment reports submitted to TEA	5 years
3275-02b	Attendance Reports	Daily registers of Pupil Attendance and similar or periodic reports used to document the attendance and absence of students. Doctor Notes., Copies of attendance and enrollment reports submitted to TEA	5 years
3275-04	Transfer, Applications for, and Associated Reports	Documentation concerning the transfer and enrollment of students in districts other than those in which they are resident. Out of District Transfers	5 years

STUDENT HEALTH RECORDS

SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3300-01	Accident Reports	Reports of accidents to students	3 years after settlement or denial
3300-02	Activity and Statistical Reports	Daily and other periodic activity and statistical reports, except those noted elsewhere, compiled by school nurses or nurse extenders relating to student health matters; Clinic log, clinic passes REFER TO (GR 1000-41b)	1-year
3300-03	Correspondence with Parents or Guardians	Correspondence to and from parents or guardians concerning student health REFER TO (GR 1000-26b)	2 years
3300-04	Cumulative Health Card or Record	This should follow student through all grades	Date of withdrawal + 7 years, or until the student's 21st birthday, whichever later.
3300-05	Emergency Cards	Card or other form of record providing information on whom to contact in case of accident or illness to student	US or until student ceases enrollment
3300-06a	Exclusion and Verification Documentation	Affidavits or similar documents seeking the exclusion from participation in immunization or other health care programs for medical or religious reasons or verifications of previous illness or health testing	1 year or date of withdrawal + 2 years if contraindication is lifelong,.
3300-06b	Exclusion and Verification Documentation	Verifications of mumps or measles illness	Date of Withdrawal + 2 years, if data from the verification documentation is recorded on the cumulative health card the documentation need be retained only as long as AV after recording
3300-06c	Exclusion and Verification Documentation	Verifications from physicians or health agencies of prior testing of sight, hearing, and spinal curvature	2 years
3300-07a	Health Screening	Worksheets, checklists, examination forms, and similar documents used in student health screening	AV after entry of info on Cum health record
3300-07b	Health Screening	Vision, hearing, and spinal screening reports submitted to TX Dpt of Health	2 years
3300-08	Immunization Records	Immunization Records	Withdrawal + 2 years
3300-09	Physician Referrals and Reports	Copies of referrals to physicians including any attached Screening worksheets and reports from physicians on referred health matters	AV after entry of info on Cum health record

3300-10	Reports to Enforcement Agencies	Copies of reports on child abuse or neglect, communicable disease, dog bites, drug offenses, missing children, or sexually transmitted disease	2 years
3300-11a	Special Health Care Records	Logs or reports of medications or treatment administered to students on a group or individual basis	3 years
3300-11b	Special Health Care Records	Parent's requests and physicians' authorizations for specialized health care	End of validity of request or auth + 2 years
INSTRUCTION AND GRADE REPORTING RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3325-01	Curriculum Guides	Course Description Handbook	US
3325-02	Grade Books	Grade Verification	5 years after recording of data in cum record (KISD policy)
3325-03	Grade Reports	Periodic grade reports created for internal administrative purposes, providing data on grades or grade rankings by class teacher, campus, course, population, ethnic breakdown, etc., Progress report	AV
3325-04	Lesson Plans	Teacher-specific documents regarding implementation of curriculum guide, selection of classroom materials and homework.	End of school year
3325-05	Report Cards	Copies of report cards or grade reports that have been reported for a student to the student's parents.	1 year after entry in Cum record
DISCIPLINE AND COUNSELING RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3350-01a	Discipline Records	Records relating to removal to Disciplinary Alternative Education Program, suspension or expulsion . These records come from the Student Services District Hearing Office	5 years
3350-01b	Discipline Records	Records relating to forms of discipline other than expulsion , ISS, D-Hall. Records relating to the discipline, corporal punishment, suspension on campus level (copies of records sent to Disciplinary Hearings) These records are the ones stored on the campus.	AV
3350-02	Student Guidance and Counseling Files	Individual student counseling files maintained by school counselors, including parental conference reports, social work records	AV
3350-03	Law Enforcement Notifications	Notification from a law enforcement agency of the arrest of a student enrolled	End of school year

ADULT AND VOCATIONAL EDUCATION RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3375-01	Class Organization Reports and Rosters		5 years
3375-02	Curriculum Planning Documentation	Calendar Events/Training Plans, Project and study plans developed by instructors in vocational education, including those for vocational summer work.	5 years
3375-04	Student Records	Cooperative training plans, applications for participation in work study programs; student rating forms, progress reports, and record cards; individual follow up records; and similar records of assignments to and the completion by a student of vocational education projects and tasks.	End of enrollment + 5 years
ACCREDITATION RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3425-01a	Accreditation Reports	Reports to TEA on accreditation planning or the self monitoring of progress toward the achievement of goals	AV after subs. Accreditation
3425-02	Planning Records	Self studies; planning documents used to establish goals and indicators; achievement reports, documents evidencing parent, community and staff involvement in the establishment of performance objectives. Campus Plans (Review before disposal; some records of this type may merit permanent retention for historical reasons. (GR 1000-41)	AV after subs. Accreditation
3425-03	District Improvement Plan	Plan and supporting doc. Developed, evaluate and revised annually.	US + 5 years
3425-04	Campus Improvement Plan	Plan and supporting doc. Developed, evaluate and revised annually.	US + 2 years
FOOD SERVICE RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3450-01	Certificates of Authority	Authorizations for persons to act on behalf of a school district in school lunch matters	Date rescinded or terminated + 5 years.
3450-02	Daily Food Service Records	Summer Food Service Program, Daily record of full price, reduced price, and free breakfasts and lunches served	End of program year + 5 years.

3450-03	Food and Food Equip. Inventory Records	Commodities Reports	End of program year + 5 years.
3450-04a	Free or Reduced Price Meal Records	Applications from parents for fee or reduced price breakfasts or lunches; rosters or lists of eligible students	End of program year + 5 years.
3450-04b	Free or Reduced Price Meal Records	Rosters or lists of eligible students	FE + 5 years
3450-04c	Free or Reduced Price Meal Records	Policy statements on free and reduced price meals	US + 5 years
3450-05	Health Inspection Reports		End of program year + 5 years.
3450-06	Menu Records	Daily Menu and planning records	End of program year + 5 years.
TEXTBOOK RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3475-01	Annual Membership Report	REMOVED	AV
3475-02	Local Textbook Committee Report	REMOVED	US
3475-03	Textbook Custodian Bonds	REMOVED	US + 2 years
3475-04a	Textbook Inventory and Distribution Control Records	Inventories	US + 1 year
3475-04b	Textbook Inventory and Distribution Control Records	Book cards and records comparable in function documenting what books were distributed to each student similar records documenting their return or non return	End of school year or date of withdrawal, + 3 years.
3475-04c	Textbook Inventory and Distribution Control Records	Records documenting the distribution, transfer, and return of textbooks on a campus by campus basis, reports on state owned textbooks that have been destroyed	End of school year
3475-05a	Textbook Procurement Records	Requisitions and supplemental requisitions for textbooks, learning systems, and related materials including those for visually disabled students. Including supporting documents such as statements of charges, packing slips, freight bills and shipment error reports	FE + 2 years

3475-05b	Textbook-Procurement-Records	Order Notifications from TEA concerning processing of textbook orders REMOVED	AV-after receipt and reconciliation of shipment
3475-06a	Textbook Sales and Disposition Records	State textbook sales invoices and acknowledgement statements, logs, of textbooks paid for, payment or reduced payment waivers, payment account cards and any district forms used for the transmittal of textbook funds from campuses to the textbook coordinator	FE + 2 years
3475-06b	Textbook Sales and Disposition Records	Records relating to the disposition by donation or destruction of expiring or out of adoption textbooks	AV
SCHOOL TRANSPORTATION RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3500-01	Application for New Transportation Programs	Requests to TEA for approval of state funds for eligible pupil transportation services	FE + 5 years
3500-03a	Driver Records	Medical Examination reports	US + 3 years
3500-03b	Driver Records	School bus driver training certification verification	US, Expires, termination + 5 years
3500-03c	Drivers Records	Driver's license record checks	US or date of separation + 2 years as applicable
3500-04	Eligible Rider Documentation	Documentation maintained in the form of lists of actual bus riders by name and route number, including all associated records providing source information needed to complete ridership sections of state pupil transportation reports	3 years
3500-05	Pupil transportation Reports	Annual reports to TEA on the number of pupils transported by bus or private means (including route mileage)	3 years
3500-06	Route Descriptions	A turn by turn accounting for each approved route	US + 3 years
3500-07a	Transportation Cost and Maintenance Records	Vehicle master record containing the following; complete description of the vehicle, including vehicle id and license number, annual beginning and ending odometer reading, total annual fuel, maintenance, labor, and parts cost, and complete maintenance history	LA
3500-07b	School Transportation Cost and Maintenance Records	Service requests/work orders, Daily activity reports compiled by vehicle shop personnel and/or driver showing fuel and oil consumption, odometer readings, routine inspections etch, Bus/Suburban Trip Sheets, School bus usage reports for extracurricular activities, field trips or for private purposes under contract needed for compiling annual operating costs reports	2 years

3500-07c	School Transportation Cost and Maintenance Records	Daily activity reports compiled by vehicle shop personnel and/or drivers showing fuel and oil consumption, odometer readings, routine inspections, etc.	2 years
3500-07d	School Transportation Cost and Maintenance Records	School bus usage reports for extracurricular activities, field trips, etc.	2 years
3500-07e	School Transportation Cost and Maintenance Records	Annual operations cost reports submitted to TEA	FE + 5 years
3500-08	School Bus Purchase Requisitions		FE + 5 years
3500-09a	School Bus Surveillance Video	No Incident	AV
3500-09b	School Bus Surveillance Video	Incident occurring	30 days after incident resolved or verdict is rendered
SCHOOL SAFETY RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3525-01	Evacuation and Fire Exit Plans		US
3525-02	Fire Drill Records	Records of fire drills, including schedules, reports, correspondence with fire dept. and associated documentation	3 years
3525-03	Fire Safety Insp. Reports		5 years
FINANCIAL RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3550-01	Agency Fund Accounting Records	Any accounts payable, accounts receivable, or ledgers and journals used to document the receipt and expenditure of local agency funds from clearing accounts that are custodial in nature (e.g. activity fund) REFER TO (GR Part 2 1025-31c)	FE + 5 years

3550-02	County Available Reports	REFER TO (GR 1000-41)	FE + 3 years
3550-03	School Bonds	Applications for Guaranty of REFER TO (Schedule GR part 2) (GR 1025-03b)	1 year after payment
INDIVIDUAL EMPLOYEE RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3575-02a	Applications and Recommendations for Professional or Paraprofessional Certificates or Permits, Copies of	Application for Nonrenewable Permit	Date of expiration or denial of permit + 1 year
3575-02b	Applications and Recommendations for Professional or Paraprofessional Certificates or Permits, Copies of	All Others.	AV
3575-03	Audit Verification Cards	The most recent audit verification card present in file upon separation must be retained Permanently and should be considered an addendum to Teacher Service Record	US, The most recent audit verification card present in his or her personnel file upon separation of an employee must be retained PERMANENTLY and should be considered an addendum to the Teacher Service Record
3575-04	Deficiency Plan	Out of state certificates, deficiency plans, and other documents temporarily authorizing a person to teach in the district until a Texas teaching certificate is obtained.	Until replaced by Texas teaching certificate or date of separation +5 years, as applicable.
3575-05a	Performance Appraisal Records	Appraisal record (Original by HR)	Permanent
3575-05b	Performance Appraisal Records	Observation/evaluation forms	US + 2 years
3575-05c	Performance Appraisal Records	Notes taken by appraisers during observations or observations used to determine credit for the criteria and indicators on the observation/evaluation forms (Local)	Date signed + 2 years
3575-05d	Performance Appraisal Records	Teacher assessments of instructional goals and outcomes (Local)	AV

3575-05e	Performance Appraisal Records	Professional growth plans	4 years
3575-05f	Performance Appraisal Records	Grievance and response documents	Same period as the appraisal record to which they relate
3575-05g	Performance Appraisal Records	Mentor	4 years
3575-06	Service Record Affidavits	Affidavits attached to teacher service record claiming months served prior to the 1949-1950 school year	Permanent
3575-07	Statement of Commitment (Out-of-State Certificates)	REFER TO SD 3575-04	Until Receipt by district of Texas-certif or date of separation + 5-years
3575-09	Teacher Certificate Registers		Permanent
3575-10	Tuberculosis Certificate	REMOVED	AV
3575-11	Criminal History Checks		Must be destroyed 1 year after received or date information used for the authorized purpose, whichever sooner.
3575-12	Alternative Cert. Programs	Cert. to become a teacher, documents, applications, transcripts, observation notes	Date of completion, withdrawal, discharge or release + 5 years
STAFFING RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3575-16	Personnel Rosters	Including those detailing assignments to grades, courses, etc. Master Schedule and Staffing, Personnel Directory, Personnel Roster	3 years
3575-18	Substitute Teaching Roster		3 years
3600-01	PEIMS Data Submissions	Peims Data Submission	5 years
3600-02	Data Verification Reports	Data printouts or reports from TEA showing data received and entered in TEA seeking confirmation of the accuracy of current data info	AV
3600-03	Surveys	Surveys, questionnaires, opinion polls, and similar documents received from TEA completed and returned by the superintendent or other school official, and used by the agency for the preparation of needs assessments or statistical reports	AV

MISCELLANEOUS RECORDS			
SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3625-01a	Program Approval Applications	Applications approved	US + 5 years
3625-01b	Program Approval Applications	Applications not approved	AV
3625-02a	Request for Waiver of TEA Policies and Rules	Requests granted	5 years
3625-02b	Request for Waiver of TEA Policies and Rules	Requests not granted	AV
3625-03	School Calendar		US + 2 years
3625-04	UIL	Correspondence, schedules, rosters, reports, records of participation and similar documentation, except financial records, concerning the participation of a district in academic, music, and athletic contest and programs governed by UIL; athletic physicals, cheerleading records etc.	2 years
3625-05	Athletic Physicals		3 years
3625-05	Extracurricular Activity Records	Application, selection, and evaluation records for participation in extracurricular activities	2 years
3625-06a	Student Drug/Alcohol Test Results	Negative Results	1 year
3625-06 - B	Student Drug/Alcohol Test Results	Positive Results or Refusal Form	Date of withdrawal, graduation or 5 years whichever is sooner
3625-07	Visitor Logs	Logs, registers, or similar records documenting visitors.	3 years
3625-08	Parking Decal/Permit		US or expiration of permit

LIBRARY RECORDS

SERIES #	RECORD TITLE	RECORD DESCRIPTION	RETENTION PERIOD
3650-01	Accession/Deaccession Records	Records used to update library catalogs or inv. Records of the accession through purchase or gift or the deaccession through loss or withdrawal	AV
3650-02	Borrower Registration Records		AV
3650-03	Circulation Records		AV
3650-04	Interlibrary Loan Records		AV
3650-05	Inventory Records	Shelf lists or equivalent	US
3650-06	Library Catalogs		US
EMAILS JUST AS PAPER RECORDS, MUST BE RETAINED IN ACCORDANCE WITH THE DISTRICT RECORDS			